Export Strategy for the Market Entry of Companhia das Lezírias in Germany

Eva Christ

Dissertation to obtain the degree of

European Master of Science in Oenology and Viticulture

Supervisor: Prof. Francisco Gomes da Silva

President: Jorge Manuel Rodrigues Ricardo da Silva (Phd), Full Professor, at Instituto Superior de Agronomia, Universidade de Lisboa.

Members - Luca Rossetto (Phd), Professor at Universitá degli Studi di Padova;

- Carlos José de Almeida Noéme (Phd), Associate Professor, with aggregation at Instituto Superior de Agronomia, Universidade de Lisboa;
- Francisco Ramos Lopes Gomes da Silva (Phd), Assistant Professor at Instituto Superior de Agronomia, Universidade de Lisboa

2017

A B S T R A C T

"Companhia das Lezírias", an important and ambitious winery of Portugal has the vision to export its sustainable and unique wines to Germany. Composing a detailed export strategy for the German wine market, was the main goal of this master thesis. The specific task encompassed the evaluation of the market potential for implementation of the wineries brand "Tyto Alba".

To generate the best market entry possible several measurements are conducted: Firstly the analysis of internal strength and weaknesses of the winery Companhia das Lezírias and the product intended to be exported, to generate a specific adapted market research. The applied tools used are a PEST-Analysis, which included Politics, Economics, Society and Technology of Germany, which sketch the country Germany and its inhabitants. Furthermore a detailed wine market analysis is performed by outlining the whole supply chain, starting by the domestic wine production, import relations, the diversity of distribution channels and the position of Portuguese wine on the German wine market. The wine consumer analysis make it possible to narrow the target group for the wine brand and locates ideal potential consumers in the three federal states Hessen, Rhineland-Palatine and Nordrhein-Westfalen.

Through the aid of a SWOT-analysis and the creation of a TOWS-Matrix, it is shown that the German wine market on the one hand is highly competitive and characterized by a high price pressure of the discounters, but on the other hand offers great opportunities for premium priced wines, innovative packaging and outstanding wine growing regions. The implementation of the wine brand "Tyto Alba" has therefore great chances on the German wine market, by focusing on the evaluated target group and the distribution channel of the specialist retailers. Four possible marketing strategies are the additional outcome and confirm the implementation of the product on the German wine market.

Key words: Export Strategy, German Wine Market, Companhia das Lezírias, SWOT Analysis, Distribution Channels

R E S U M O

A Companhia das Lezírias, uma adega portuguesa de renome, tem a ambicao de exportar os seus vinhos para a Alemanha. Esta tese de mestrado tem como objectivo compor uma estrategia de exportacao para o marcardo alemao. Para tal, o potencial de implementacao da marca "Tyto Alba" foi avaliado.

De forma a garantir a melhor entrada no mercado, foram feitas várias análises: Em primeiro lugar foi feita uma análise das forcas e fraquezas da adega Companhia das Lezírias e do seu produto a exportar, de forma a gerar uma estratégia de mercado adequada. As ferramentas utilizadas foram a PEST-Analysis, incluindo Política, Economia, Sociedade e Tecnologia Alemas, onde é feita a caracterizacao da Alemanha e sua populacao. De seguida, é feita uma análise detalhada do mercado, destacando toda a cadeia logística, comecando pela producao de vinho domestico, relacaoes de importacao, diversidade de canais de distribuicao e concluindo na posicao dos vinhos Portugueses no mercado Alemao. Através da análise de mercado, podemos tanto definir um target para a marca a implementar, como localizar potenciais consumidores nos tres estados federais Hessen, Rhineland-Palatine and Nordrhein-Westfalen.

A Alemanha é um pequeno país produtor de vinho e, como tal, foi-se desenvolvendo como o país que maior volume de vinho importa em todo o mundo. O mercado de vinhos Alemão, caraterizado por uma distribuição com uma estrutura complexa e consumidores muito recetivos a novidades, é considerado um mercado muito liberal. O aumento do consumo per capita, vem demonstrando o elevado potencial deste mercado, em que alterações e recém-chegados são sempre bem-vindos. A baixa produção de vinhos tintos na Alemanha representa uma oportunidade para outros países e torna os consumidores mais flexíveis nas preferências pelos países de origem dos vinhos importados. Por outro lado, a diversidade dos vinhos do Mundo Velho e do Novo Mundo cria uma elevada competitividade nos mercados, tornado mais complexas as escolhas dos consumidores.

Os resultados da segmentação do envolvimento com o vinho são muito interessantes, e indicia que as pessoas mais interessadas em vinho têm mais de 35 anos. Há mais homens interessados em vinho, provenientes de classes sociais mais elevadas, com elevados níveis de formação e graus universitários concluídos, e que vivem essencialmente nos estado federados de Rhineland-Palatine, Hessen eNordrhein-WestfalenEsta informação é crucial, pois permite localizar o grupo-alvo e atuar num território mais reduzido da Alemanha. Para além disso, o grupo de consumidores mais interessados gasta, em média, 5,30 €/litro de vinho. Isto indica que, os consumidores de vinho mais interessantes

são mais orientados para vinhos premium. A análise efetuada aos consumidores de vinho permitiu estreitar o grupo-alvo em termos de marca de vinho, e localiza os consumidores potenciais nos estados federados de Hessen, Rhineland-PalatineeNordrhein-Westfalen. Outro aspeto importante dos consumidores de vinho alemães são os critérios de copra de vinho. Os critérios mais importantes que identificámos foram: casta, marca de vinho, aroma do vinho, país de origem e região de produção. O critério de compra mais significativo foi o aroma.

Com a ajuda da análise SWOT e através do TOWS-Matrix, é demonstrado que o mercado Alemao é altamente competitivo e pressionado pelos discounters. Contudo regioes de producao vinicola excepcionais, packaging inovativo, e vinhos da categoria premium apresentam maior potencial de implementacao no mercado alemao. Focando no target definido e via retalhistas especializados, a marca "Tyto Alba" apresenta todos os requesitos de implementacao. Por fim, sao sugeridas quatro estratégias de marketing especialmente adaptadas ao mercado de vinho alemao.

A Estratégia SO também é conhecida como “Estratégia Maxi-Maxi”, na qual a empresa utiliza a maior parte das suas Forças internas na tentativa de aproveitar as melhores Oportunidades externas. O vinho Tyto Alba é um produto complexo, posicionado no segmento de preço premium, que evidencia a necessidade de se comunicar a história por detrás do produto. Compensa assumir um foco em canais de distribuição do retalho especializado, uma vez que os seus vendedores têm a capacidade para comunicar diretamente com os consumidores.Outro aspeto estratégico deste tipo de canal de distribuição é o facto de os vinhos, que foram implementados com sucesso pelo retalho especializado, terem apresentado maiores probabilidades de ser referenciados em supermercados, uma vez que as tendências de consumo de vinhos são originadas em lojas de retalho especializadas. A Estratégia WO também é conhecida como Estratégia Mini-Maxi, e pode ser utilizada para superar as Fraquezas de uma empresa tirando partido das Oportunidades existentes. Sendo a Alemanha um país conhecido pelas suas grandes superfícies florestais, é relevante que a filosofia das adegas envolva a proteção da natureza. Um grupo-alvo nesta matéria podem ser as associações de caçadores, que associam cerca de 245.000 membros, podendo a aproximação ser feita através de uma das feiras de caça que ocorrem na Alemanha todos os anos.Marcar presença nestas feiras de caça, natureza e paisagem constituiria uma ação extraordinária por parte da Adega, e atrairia a atenção de um número muito significativo de potenciais clientes. Apresentar o vinho incluindo a caixa-ninho, comunicar a visão da Adega sobre sustentabilidade e proteção da floresta neste tipo de envolvente criaria significativo feedback, fortaleceria a imagem da Adega, originaria artigos escritos em publicações da especialidade. Com base nesta estratégia, diversos multiplicadores serão criados.

Na Estratégia-ST a empresa Evita as Ameaças externas utilizando as suas Forças. Esta estratégia tira partido das três regiões, Rhineland-Palatine, HesseneNordrhein-Westfalen. Nestas três regiões existe um elevado poder de compra por parte dos consumidores, e existe também um nível de consumo mais elevado, o que é adequado ao posicionamento premium do Tyto Alba. Uma outra medida, para evitar a pressão provocada pela enorme diversidade dos vinhos do Novo Mundo e dos vinhos clássicos do Mundo Velho será a focagem apenas em retalhistas especializados ou especialmente focados em vinhos Portugueses. As lojas de vinhos portugueses estão especialmente localizadas nas seguintes cidades: emNordrhein-Westfalen: Köln, Düsseldorf, Dortmund, Essen Duisburg. EmHessen: Frankfurt amMain, Wiesbaden, Kassel, Darmstadt, Gießen. EmRhineland-Palatine: Mainz, Ludwigshafen, Trier, Koblenz, Kaiserslautern, Neuwied.

No caso da Estratégia-TW, procura-se a minimização das Fraquezas internas e das Ameaças externas através do fortalecimento da política de comunicação da empresa. Quando se exporta profissionalmente para o mercado do vinho Alemão, isso implica desde logo a revisão do "rótulo" posicionado na parte de trás da garrafa, uma vez que este está apenas disponível em português e inglês. Outro fator crucial reside no facto de os consumidores alemães avaliarem o aroma como um critério fundamental de compra. Assim, a descrição de "seco" (em Alemão "trocken") deverá ser realçada no rótulo da parte de trás. Dele deverá também constar uma descrição detalhada dos aromas, bem como de alguns emparelhamentos com comidas. Especialmente nas situações de compra sem apoio do vendedor especializado, estas informações são cruciais para a decisão do consumidor.

Tudo considerado, o vinho Tyto Alba apresenta-se como um produto único, com elevado potencial, e que encaixa bem no mercado de vinhos Alemão.O entusiasmo colocado nos detalhes da marca do vinho têm enorme potencial para serem comunicados intensamente, e oferecem excelentes hipóteses de maior proximidade para com o consumidor. Atualmente, o tópico sustentabilidade continua a ganhar peso na sociedade, o que transforma a filosofia da Companhia das Lezírias e a sua ação num modelo para toda a indústria do vinho.

Entradas: Estratégia de Exportação; Companhia das Lezírias, SWOT Análise, Canal de Distribuição, Grupo Alvo, Mercado Alemão de Vinhos

Structure

I List of Figures and Tables

1. Introduction

Globalization, open borders and especially the creation of the European Union make international trade nowadays easier, faster and more efficient. Exporting goods can be a chance and a risk for a company at the same time. Implementing a product on an external market is a challenge, that can be accomplished by creating an accurate export strategy, which analysis the market into detail, illustrates the consumers demands and points out the companies possibilities.

1.1 Motivation

As I did my Bachelor in International Wine Business at the university Geisenheim I was introduced to the German wine market very early in my life. I worked for one of the most known premium wineries "Heymann-Löwenstein" in Winning/Mosel on the one hand and the second largest winery in Germany "Reh-Kendermann" in Bingen/Rhein on the other hand. Having both point of views in mind, it has become easier to understand the international wine market. To point out my own curriculum vitae at the beginning is necessary, to inform the reader about my experiences and explains my motivation.
Writing my master thesis for Companhia das Lezírias and developing an export strategy to Germany for them is a big motivation, as I already did many SWOT analysis in a theoretical, scientific context at the wine universities Geisenheim, Montpellier and Bordeaux. Having the opportunity to switch theory into practice represents a challenge and a great training at the same time.

1.2 Problem Definition and Objective

Important to point out in this chapter is that Companhia das Lezírias is working together with the external export company "Wines & Winemakers by Saven" in order to distribute their wines worldwide. This requires the information supply of the winery and the export company at the same time. These circumstances imply that the export strategy of this Master thesis is the frame, the first step needed by the external export team "Wines & Winemakers by Saven" to enter the German wine market and to convert the given information to an actual market entry. This market entry will be focused on the wine brand "Tyto Alba", as the winery expressed their priority on this product to export to Germany and to promulgate the companies name through it. In the end, this thesis will be not a company audit, it will be an intense market research, especially created for Companhia das Lezírias' wine brand "Tyto Alba" and the person in charge of the export, who will decide how to use these information and how to act on the German wine market. The main goal is to create an individual, unconventional and practice orientated documentation.

1.3 Structure of the Thesis

"Companhia das Lezírias", an important and ambitious winery of Portugal, has the vision to export its sustainable and unique wines to Germany. Composing a detailed export strategy for the German wine market, will be the main goal of this master thesis. In this context it is important to mention that a full SWOT Analysis will be performed with the most current data available and to generate an actual strategy to make the export the best way possible. As this scenario is based on reality, and not a theoretical exercise, only information of crucial importance will be used and discussed. In general it can be seen as an export guide especially created for "Companhia das Lezírias".

To understand the structure of this strategy clearly and without misunderstandings, the single steps will be described and explained now. The companies philosophy and its intentions are firstly pointed out to understand the origin of this thesis. In this context the product "Tyto Alba" which is supposed to be exported to Germany will be characterized. These company related features are representing all the internal factors, which will outline strengths and weaknesses.

Secondly a short, but precise PEST analysis will follow, which includes all external factors of the market analysis. These are namely: Politics, Economics, Society and Technology of Germany. All of these four external points will sketch the relevant knowledge and facilitate the understanding on key issues of the country Germany.

Afterwards a detailed wine market analysis of Germany will be outlined, focused on consumer behavior, preferences and the diversity of sectors. With this market analysis the winery will be able to understand its next export market and will also get a feeling for the country and its inhabitants and culture.

A special attention will be given to the analysis of the target group, to identify the potential of the wine brand "Tyto Alba" concerning German wine consumers and to generate a detailed external market overview.

Having the external and the internal points analyzed, it will be possible to create the TOWS matrix, which is created by Threats, Opportunities, Weaknesses and Strengths. These four items will then end up in four possible strategies, how to export to Germany. Having four strategies, possible retailers, wine shops and supermarkets will be mentioned, generating exact data about their position and including all their contact data.

The next and last step would be the Marketing-Mix consisting of the "4-P": Price, Product, Place and Promotion. As Companhia das Lezírias has already a product with a special marketing purpose and also a conception of the price, this will focus on the Place, the distribution and its possibilities to generate the best market entry possible for Companhia das Lezírias in Germany.

2. The Company and its Philosophy

In this chapter the company will be characterized and described to clarify the companies national and international importance, its history and its current situation for the reader.

Companhia das Lezírias, founded in 1836, is the largest agriculture, cattle and forest farmstead in Portugal, covering the marshlands of Vila Franca de Xira, Charneca do Infantado and Pauis. Totaling about 18,000 hectares. The Lezírias, which means "the marshy land" is located between the Tejo and the Sorraia Rivers. Wine and olive oil production are marginal sectors. (CL, 2017)

Companhia das Lezírias was nationalized in 1975 and later, in 1989, it became a public limited company wholly owned by public funds. Since 1997, Companhia das Lezírias has consolidated its situation over time in both technological and financial terms, based on a philosophy of a sustained development. (CL, 2017)

One parcel of this giant institution is the winery, which is situated in the Tejo wine growing region. In the following paragraph, an specific designed interview with the wineries' board member João Caldeira will be outlined, with underlying data, facts and the wineries' long lasting philosophy.

1. *How would you define your main companies philosophy?*

   "We are committed to preserve, enhance and add value to the resources made available by Companhia das Lezírias, in an environmentally respectful manner and making use of management practices that fully capture its diversity, richness and relevance, while emphasizing the integration of its activities and its processes sustainability."

2. *What are your main visions and missions?*

   a. Wines are to be produced from our own grapes, producing better and keeping a better planet. The commitment ABC 2020 is a resuming and summerizing this into detail, which indicates, that we commit ourselves to produce better, with lower environmental impact, lower consumption of energy and materials, lower water consumption, lower environmental emissions, lower waste production whilst conserving land and ecosystems.
   b. Continuing to be a profitable company.
   c. Using the wine bottles to "spread" the name of the company and through it inviting the consumers to visit and learn more about what and how is happening in Companhia das Lezírias' territory.

3. *How would you define your long-lasting 10 years plan goals?*

   a. Increasing the sales on "Tyto Alba" wine brand range
   b. Having a sustainable business, "spreading the word" for a list of countries in the world.
   c. To be considered a reference in the national wine scene being part of important Research &Development with universities and other researching institutes.

4. *The wineries production in hectoliters and bottle?*

    a. 600.000 liters
    b. About 400.000 bottles and the rest in BIB

5. *Please point out the wineries' distribution channels (% of each channel)*

    a. Supermarkets 44%
    b. HoReCa 27%
    c. Direct sales 18%
    d. Export 11%

6. *Which wines should be exported to Germany?*

    The main focus is "Tyto Alba" range but we would like to export all.

7. *Which company do you consider as your biggest competitor?*

    The market is extremely competitive, so we should talk about a "biggest competitor". Even so there are some brands that we try to include in our benchmark. From the largest company of Portugal – Papa Figos. From the same region, Quinta da Alorna

8. *Price policy? How do you create the prices?*

    Regarding a paramedic traditional approach (see below), we try to find the right prices always with the goal of a profitable brand that "pay's the built" (production costs, marketing investment,…)

Premium brand:	high profit/low volume
Basic brand:	med profit/med volumes
Entry level:	low profit/high volume

9. *How many employees does the winery have?*

    Permanent staff:

    Production: 5
    Logistic: 1
    Wine shop: 1
    Sales: 2
    Winemaker/ director: 1
    Vineyard: 4
    For specific needs (harvest, pruning etc): temporary labors

10. *Financial resources, such as funding, sources of income and investment opportunities?*

    All financing needs are met by self-funding, either for working capital or to meet investment opportunities. There is no record in the recent history of Companhia das Lezírias going to the market raising cash on the form of bank loans, bonds or whatever financial products available

11. Physical resources, such as your company's location, facilities and equipment

- 130 hectares of vineyards with 24 different varieties
- Sandy soil
- Winery Location 38° 48’ 48.1” N, 8° 52’ 53.5” W
- Total capacity: 1.150.000 liters
- Full equipped (from tanks to bottling line)

The product palette of Companhia das Lezírias is very wide and divers, which explains their presence in different distribution channels and which makes them able to act flexible on the wine market.
Five different wine ranges are available, namely: Catapereiro, Companhia das Lezírias, Tyto Alba, 1936 and Senhora de Alcamé. All price segments are available from generics (<3€), to basics (3-5€), to premium (5-<10€) and to super premium (10-<25€). (Hoffmann, 2015) To generate an detailed characterization of the winery, a table is provided in the annex (Annex 1), showing the wine categories available, as well as their export prices.

By visiting the winery the philosophy of sustainability is a constant topic and is visible and communicated clearly for the visitor. The winemaker and winery director Bernardo Cabral represents the winery in an energetic, positive and innovative way.
Logistic changes were made in the cellar of the winery, to generate an optimal supply chain management. The modern, but classy tasting room is constructed and designed in a professional and sustainable way, which makes an effective direct sale possible and to create and to fix the brand Companhia das Lezírias in the head of the costumers.
This interview, as well as the personal visit of the winery, is the frame of information needed, to understand the companies intentions. These information will be also used as internal facts to create the TOWS-Matrix in the end, to develop four individual export strategies. To specify these strategies the wine brand intended to be exported will be described in the following chapter.

2.1 Product Presentation: The Wine Brand "Tyto Alba"

2.1.1 Extrinsic and intrinsic Features of Wine

Companhia das Lezírias is aiming to export their wine brand "Tyto Alba" to Germany. Wine is a product with multiple extrinsic (intangible) and intrinsic (tangible) features, which carries meaning and communicate something about the product. Consumers use product features to minimize risk as they establish quality perceptions from product features. The intrinsic cues allow consumers a sensory experience, thus as product shape, touch, smell and sound. In the case of wine the consumer is most of the time only able to evaluate intrinsic features after the purchase. While the extrinsic features include brand name, brand symbols, packaging, label details, price, guarantees and origin. These extrinsic factors require a certain level of involvement and knowledge of the consumer. (Charters, 2014)
Due to the importance of the extrinsic product features and their crucial role concerning purchasing decisions a characterization of the product will take place, which will generate a specific wine market research on the one hand and which will narrow the final target group on the other hand.

Figure 1Wine bottle Tyto Alba, (TA, 2017)

2.1.2 The Name "Tyto Alba"

The wines name "Tyto Alba" originates from the Latin name of the barn owl, which is domestic in the wineries surrounding. The highest population of Tyto Alba in whole Europe, perhaps worldwide, is actually to be found on the grounds of Companhia das Lezírias, which resulted in the choice of the bird as a significant figurehead of the winery.

Furthermore the barn owl Tyto alba is considered to be an aid to organic farming practices as well as a sentinel species in assessing exposure and side effects of environmental pollution. These circumstances correlate directly with the companies commitment to sustainability and underlines the general philosophy of enhancing biodiversity. As a study of Prof. João Rabaça recorded a continued decline of the barn owl population in Europe, it is currently classified of having an unfavorable conservation status. The barn owl often uses manmade structures to nest and agricultural areas to feed. (TA, 2017)

2.1.3 Product Packaging

These circumstances lead to an extraordinary idea for the product packaging, which was designed by "Rita Rivotti - Wine Branding and Design".

Figure 2 Wine bottle and packaging (TA, 2017)

The wooden box, which carries the wine bottle Tyto Alba functions at the same time as a nest box for birds, as studies aimed to raise awareness of the bird species occurring in the forest areas and the influence of human management on their distribution and abundance, as well as on their role as natural controllers of forest pests. By setting up nest boxes the growth of populations of insectivorous birds is enhanced, which proved to be an effective measure in combating forest pests and diseases. (TA, 2017)

The wine label attracts attention through the eyes of the owl, which is a significant eye catcher. Placed inside the wooden box, the owls eyes are looking through an open hole, which functions as the entry for birds, when used as a nest box. Also not forgotten is the integration of a little notch to attach a branch for the birds to sit on. Even as a nest box inside a tree, the wineries and the wine brands' name will continue to be communicated, as both are burned inside the wood of the box. The wine brands name "Tyto Alba" lifts up from the label and allows a tactual experience by holding the bottle and enhances the effect of the extrinsic product features.

The bottle itself is hold in the shape of a Bordeaux bottle, which creates a high value shape. The name of the grape variety is given in a different color and generates a clear message to the consumer. This clear message is also given by the country of origin Portugal, which is directly placed under the wine brands name. The name of the winery is framed at the bottom of the label in classic black and the arms is creating symmetry, together with the vintage. In addition a green sticker, which can be seen in Figure 1, is attached at the right corner of the label. It says: "Compromisso Commitment ABC 2020, +Environment, +Biodiversity, -Carbon", in English and Portuguese. It is referring to the wineries own commitment to sustainability, as the winery operates in one of the most important reserves in Portugal, namely the Tagus Estuary Nature Reserve and the Natura 2000 Special Protection Zone, this commitment intensifies the wineries philosophy and matches to the reuse of the wooden box as a bird nest.

The packaging aroused great interest in the wine world, through several articles in Portuguese and international magazines and also won the Pentawards 2015, Silver Medal for Beverages in the wine category.

2.1.4 Product Range and Price Setting

The Tyto Alba range is available in three different cuvees: red, white and rose and three different grape varieties: Sauvignon Blanc, Merlot and Touriga Nacional. That represents a very deep product range and makes it possible to act flexible on individual markets. Especially the two international grape varieties Sauvignon Blanc and Merlot are an outstanding characteristic for a Portuguese winery. In Table 3 below only the export prices are outlined as they are from crucial importance in the context of the export strategy.

Tyto Alba	Vintage	Bottle	Colour	Origin	Export price	Export price with box	Bottles Produced
Tyto alba	2013	75 cl	Red	Reg. Tejo	4,25 €	6,69 €	60.000
Tyto alba	2015	75 cl	White	Reg. Tejo	3,64 €	6,08 €	20.000
Tyto alba	2016	75 cl	Rose	Reg. Tejo	3,64 €	6,08 €	4.000
Tyto alba Sauvignon blanc	2016	75 cl	White	Reg. Tejo	4,25 €	6,69 €	12.000
Tyto alba Merlot	2013	75 cl	Red	Reg. Tejo	5,81 €	8,25 €	6.000
Tyto alba Touriga Nacional	2014	75 cl	Red	Reg. Tejo	7,01 €	9,45 €	6.000

Figure 3 Product range of Tyto Alba, (CL, 2017)

The prices per bottle excluding the wooden wine box are positioned from Basic price segment (3-5€) to premium price segment (5-<10€). Including the price of wooden bird nest box of 2, 44€, the price segment of all Tyto Alba wines are placed in the premium price segment.

2.1.5 "Tyto Alba" on the International Market

The wine brand Tyto Alba is already successful in several countries. The wine brands exports destinations are China, Finland, Netherlands, England, Brazil, USA. In Portugal Tyto Alba is available in the HoReCa channel and in a few supermarkets. (Cabral)

In the interview with the export company "Wines and Winemakers by Saven" it turned out that the wine brand Tyto Alba is also available in two online wine shops in Germany. Namely the online shop "Bom Dia", which is specialized on Portuguese and Spanish wines. There Tyto Alba Tinto is sold by a price of 12.50€ and Tyto Alba Branco is sold by a price of 9.99€. (BomDia, 2017) The basic wines were chosen from this online shop and the wooden box is not mentioned or seen.
The second online shop is named "Kerstin Von Podewils World of Wine", where Tyto Alba Sauvignon Blanc is listed, but marked as not available, with not even a price information. (Podewils World of Wine, 2017) Furthermore it is wrongly declared as a "Bio" wine, which is not good for the reputation of the winery Companhia das Lezírias. These two online shops are not accounted as a market presence of Tyto Alba in Germany and indicate that strategies are needed to improve the choice of distributors and to increase the sales on the German wine market.

2.1.6 Online Presence of "Tyto Alba"

In terms of communication policy of the wine brand "Tyto Alba" it is worth to mention, that a separated homepage was created, with information about the wine and its history, especially focused on the barn owl and the philosophy of sustainability. To every single wine descriptions are available with content about the vineyards, the method, analytical parameters and tasting notes.

Another communication measures is the social media presence of "Tyto Alba" via Facebook. A continuous cooperate design was chosen and strengthens the brands image. 8.144 persons are liking the wines' Facebook page, which is an impressive number. Regular posts are performed, weekly or even daily, with content about nature, the barn owl, upcoming events and pictures from visitors of the winery. The posts are written in Portuguese, as most of the followers of this page are Portuguese.

The feedback, through "likes" and comments is very positive and outlines that public relations are implemented in the right way.

The selected intrinsic and extrinsic product features are used to support the product strategy as well as to reinforce the unique selling proposition (USP) of the product. For wine brands, it is important to consider which product features are the most unique, relevant or critical in communicating the value of the product to the consumer (Charters, 2014). Companhia das Lezírias accomplished to create a unique selling proposition through the detailed nest box, which represents a strengths against competitors and which addresses a special type of consumers, who are able to recognize the value of the product and who have an additional, second usage of the packaging. This transfers the wineries idea of sustainability directly to their customers and arises a stronger connection.

3. Environmental Analysis of Germany (PEST)

PEST is an acronym for Political, Economic, Social and Technological. This analysis is used to assess these four external factors in relation to the wineries situation. Basically, the PEST analysis helps to determine how these factors will affect the performance and activities of the business in the long-term. "PEST can help companies to improve their decision making and timing. The best outcome of the PEST analysis would be if the company is able to make the right decisions at the right time by analyzing different factors. Another benefit of PEST analysis is, it could aid in predicting the future by looking at the present. It also highlights opportunities and threats which influences business decisions."

Jim Makos in Business News Daily, 2016

Country:	GERMANY (Deutschland)
Language:	German
Surface:	357.104 km²
Capital:	Berlin (3,4 Mio.)
Big Cities:	Hamburg, Köln, Munich
Inhabitants:	82.110.097
Founded:	23. Mai 1949
Government:	Parliamentary Democracy
Federal states:	16 States
Wine regions:	13 wine regions

Germany is a Western European country with a landscape of forests, rivers, mountain ranges and beaches at the North Sea and the East Sea. It has over two millennia of history. Germany is located in the heart of Europe and has nine neighbors: Denmark, The Netherlands, Belgium, Luxemburg, France, Switzerland, Czech Republic, Austria and Poland – and is considered as Europes industrial centre. With its four seasons Germany doesn't have to face extreme temperatures, which also concludes in constant working hours without interruptions caused by temperature influences and a consistent everyday life.

3.1 Political Environment

Germany is a federal, parliamentary, representative democratic republic. The German political system operates under a framework laid out in the 1949 constitutional document known as the "Grundgesetz", which translates into basic law. Any and every change generally requires a two-thirds majority of both chambers of parliament. Germany is a member of the extended family of liberal Western democracies, and it has the reputation of being one of the most stable among them.
In a period of globalization, Germany takes a leading role, particularly in economical terms, also. The elections in Germany in September 2017 have resulted in the third re-election of Angela Merkel as chancellor and her parliamentary group of the parties CDU and CSU, reaching 32.9% of all votes. A dramatic change in German politics was noted by the gain of the right party AfD with 12.6% (ZDF, 2017)

The German government takes environmental issues in the country extremely seriously and the inclusion of the Green Party in the ruling coalition over the past few years has greatly influenced Germany’s energy and environmental policy objectives. From phasing out nuclear power to promoting energy efficiency and renewable energy, Germany has become a pioneer within the EU in reducing greenhouse gas emissions and in making alternative fuel sources viable. As a result, Germany has become the world leader in wind energy (CIA 2017). This policy is also reflected in the steady increase of bio food and bio wines consumption in Germany. This consumption behavior will be outlined into detail during the market analysis and the description of the target group, as Companhia das Lezírias is producing sustainable wines, which is a factor that suits to this market development.

The current legal situation concerning alcohol policy is described in the following: For people who are younger than 14 years, alcohol is forbidden in general. Drinking alcohol legally starts with the age of 18. Alcohol, which is produced through fermentation like beer, wine or sparkling wine is allowed from the age of 16. Alcohol and driving cars is strictly controlled in Germany. Above a blood alcohol limit of 0.5, driving a car would be a regulatory offense. This concludes, that the target group of Companhia das Lezírias starts theoretically at the age of 16 years. (KdL, 2017)

Furthermore it is interesting that there is no consumption tax for wine. Differently is the situation for sparkling wine: for one bottle of sparkling wine the consumer is paying 1.02 Euro consumption tax. This results in a consumption tax of 136 Euro per hectoliter of sparkling wine. (Zoll, 2017) In general Germany is considered as a liberal alcohol market, with lower alcohol prices in comparison to other European countries and has no laws against alcohol advertisement or sales limitations. (KdL, 2017)

3.2 Economical Environment

Germany is Europe’s largest and strongest economy. On the world scale, it now ranks as the fourth largest economy, after USA, China and Japan, in terms of nominal GDP. The size of its nominal GDP is €3.132 billion, while Germany’s GDP (PPP) per capita is €37.866, and the economy has moved at a moderate pace of 1-2% in recent years and is forecasted to stay that way. (Investopedia, 2017)
The GDP of Germany is divided in the following sectors: 69% in the service sector, manufacturing trade makes 26%, constructing business 5%, while the income from agriculture and forest economy makes only 1%. The current unemployment rate represents 6,3%, which is lower than the years before. (DESTATIS, 2017)

Germany's trade surplus reached a new record of €252.9 billion ($270 billion) in 2016, the largest gap between exports and imports since the country's statistical agency started keeping records. Exports from Germany rose 11.8 % from a year earlier to EUR 98.9 billion in January of 2017. Germany is the second largest exporter in the world, after China, with exports accounting for almost an half of its economic output. (Investopedia, 2017)
Germany's main exports are: vehicles, machinery and equipment, electrical products, pharmaceutical products, optical, photographic, plastics and aircraft. The main export partners are: the US (10 % of the total exports), France (9 %), the UK and the Netherlands (7 % each), China (6 %), Italy and Austria (5 % each). (Zoll, 2017)

In general Germany is considered as an economical strong country, which results in a stable market situation. None the less German consumers are increasingly worried about job security, which is caused by limited working contracts. They exhibit high price sensitivity and avoid making expensive purchases, particularly food. Closures of restaurants, small food retailers and other businesses relying on consumer spending are a consequence. In their place, large discount supermarket chains such as Aldi and Lidl dominate food purchases (DESTATIS, 2017).

On the other hand the per capita purchasing power of Germans reached a plus of 1.7%, in comparison to the previous year 2016. The federal countries in Germany with the highest purchasing power are Bayern, Hamburg, Hessen, Nordrhein-Westfalen, Rhineland-Palatine, which indicates that the south of Germany is considered to have the highest living standards and highest incomes. (GfK, 2017) This information can be used for the target group analysis and accounts for an external factor of the SWOT analysis.

3.3 Social Environment

Right from the time in sixties in particular, extensive democratization has led to the legacy of an authoritarian state being replaced by an open, participative, civil society, which is somewhat given an idea of open-civil society (MarketResearchReports, 2016).

Since the refugee crises in 2015, Germany is facing demographic and also political changes in society. Populist groups and parties are disturbing the political balance and are responsible for demonstrations and political discussions. In the following section the demographic facts will be presented, to understand German society and to determine the possible target group.

Average age of the Germans is 46,2 which represents the second oldest average age in the world after Japan. (Statistika, 2017) In general Germany is facing an older population, which is caused by low birth rates and the rising life expectancy (BPB, 2016). The ethnic groups are divided as follows: German 91.5%, Turkish 2.4%, other 6.1% (made up largely of Greek, Italian, Polish, Russian, Serbo-Croatian, Spanish). Religious groups are: Protestant 34%, Roman Catholic 34%, Muslim 3.7% and unaffiliated or other 28.3%. (BPB, 2016)

Knowing the main facts about the German population, the cultural dynamics will be described in the following part, specialized on the business culture, as the export strategy demands a professional and adapted contact with German business partners. German people like to plan, they are known to be gifted in organization. The German thought process is extremely thorough, with each aspect of a project being examined in great detail. Rules and regulations are present in everyday life and in business culture, this is reflected in the adherence to prescribed business rules resulting in, a low degree of flexibility and spontaneity in attitudes and values. (BusinessCulture, 2016)
This also leads directly to the next crucial point in German culture, namely the punctuality: Germans are most comfortable when they can organize and compartmentalize their world into controllable units. Time, therefore, is managed carefully and calendars, schedules and agendas must be respected. Trains arrive and leave mostly on time, projects are carefully scheduled, and organization charts are meticulously detailed. Germans are extremely punctual, and even a few minutes delay can offend. If running late on a meeting, it is highly recommended to inform business partners about it. Being five to ten minutes earlier for important meetings is conventional.
Last point in terms of business culture is the way of dressing. Germans take great pride in dressing well, regardless of where they are going or what position they hold. Appearance and presentation is very important to Germans, particularly with regard to business. Even when dressed informally, they are neat and conservative; their clothes are never ostentatious. (BusinessCulture, 2016)

3.4 Technological Environment

Germany's achievements in the sciences have been significant, and research and development efforts form an integral part of the economy. The Nobel Prize has been awarded to 104 German laureates. For most of the 20th century, German laureates had more awards than those of any other nation, especially in the sciences physics, chemistry, and physiology or medicine. Important and significant laureates are for instance Max Blank, Werner Heisenberg, Max Born and Albert Einstein.

Germany is the world's first largest automobile producer, with more than 70 % of vehicles produced here intended for export. Machine and plant construction, in which most German industrial undertakings are involved, is also of outstanding international importance. Germany is also a world leader in the chemical industry. Furthermore, among Germany's most innovative sectors with above average growth rates are those of technologies for the use of renewable energies as well as information technology and bio-technology (UKessays, 2015).

In Germany the usage of internet is increasing steadily every year. In 2016, 84% of the German population is online through smart phones, tablets or computers or laptops. This number increased about 7% in comparison to the previous year. Also the use of smart phones increased 14%: 66% of Germans are owning a smart phone nowadays. The two most popular and mostly used applications are Facebook (22% of the Germans are using is daily) and WhatsApp (49% of the Germans are using it daily). (ARD, 2016) This indicates a progressive development of technology and online usage in Germany.

To summarize the German culture and to outline upcoming challenges of the country there are several changes happening in the German society, based on general environmental circumstances:

> Firstly: The modernization and initialization, which are caused by the opening of social spaces through a higher education level, an increasing mobility and networking. This creates expanding development in opportunities and choices.

> Secondly: Excessive demand and regression: An excessive demand and insecurity through economical, socio-cultural and technological conversion. Through the diversity of choices and the loss of standardization of curriculum vitas. In consequence the appearance of disorientation, loss of purpose and the search of reassurance are taking place.

> Thirdly: Internationalization and segregation: Through digitalization and globalization divergent values are created, as well as the differentiation of social hierarchies and decrease in social classes. Consequences are the erosion of the middle class and the development of cosmopolitan elite. (Sinus, 2015)

4. German Wine Market Analysis

Understanding the German wine market into detail is one cardinal aspect for Companhia das Lezírias to generate a successful export of their wines. Therefore the very first step of analyzing the German wine market will be the formulation of the "Wine Chain", which encompasses the value chain, starting by the producers, describing the distribution channels and ending by the consumers.

4.1 German wine production

On a vineyard area of 102.000 Hectare, 8346 wineries are growing wine, with this area they represent the 14. largest wine growing country in the world. With a production of 8,9 Mio Hectoliter the yield in 2016 was four percent less than the year before and two percent below the general average. In comparison to that, Italy produced 49,5 Mio Hectoliter, and represents the biggest wine producer in the world, while Portugal produces 6,5 Mio Hectoliter in the year 2016. (DWI, 2016)

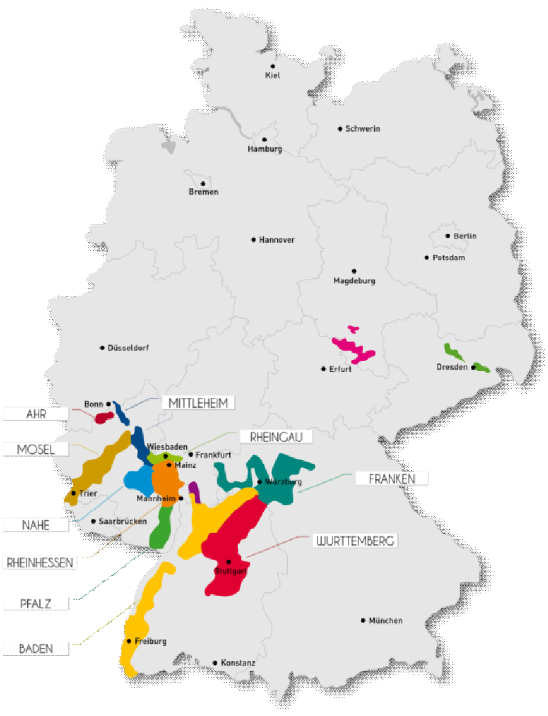

Figure 4: German Wine Growing Regions (DWI, 2015)

Germany has 13 wine growing regions: Rheinhessen, Pfalz, Baden, Wüttemberg, Mosel, Franken, Nahe, Rheingau, Ahr, Mittelrhein and Hessische Bergstraße, which are located in the south west of Germany. While only two regions, namely Saale-Unstrut and Sachsen are located in the north. This distribution of wine growing regions is also a crucial factor for the segmentation of the German wine consumers, as southern German people are much more familiar with wine culture than people in the north. This will be described into detail in the chapter of the consumer segmentation.

About 60% of German production comprises of white wine and 40% of red wine.

The top five white varieties are Riesling, Mueller-Thurgau, Silvaner, Pinot Grigio, and Pinot Blanc, accounting for 77% of the white wine area. The most popular red varieties are Pinot Noir, Dornfelder, Portugieser, Trollinger, and Black Riesling accounting for 77% of the red wine area. (DWI, 2017)

4.2 Definition and structure of the German wine market

The frame of the German wine market analysis is provided by Figure 5, which contains all basic data and mainly takes the function to visualize the overall structure and to generate an optimal overview of the wine chain, which was created at the Hochschule Geisenheim University.

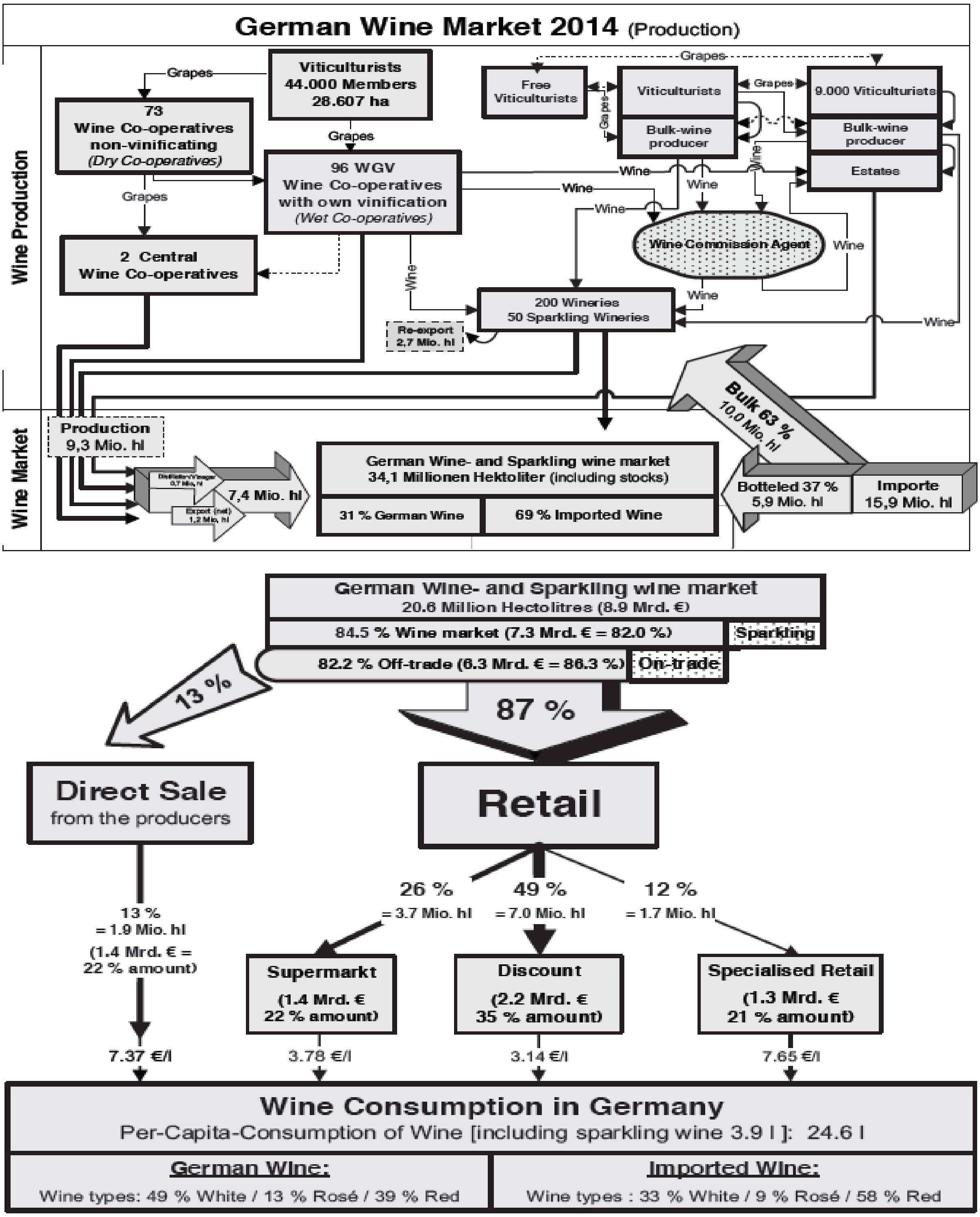

Figure 5: The German Wine Chain (Hanf, 2017)

The German wine market has a volume of 20.6 Mio Hectoliters and a value of 8.9 billion Euro, while 31% are German wines and 69% are imported wines. Only three countries in the world, namely USA, France and Italy have a bigger wine market than Germany. All three countries dispose of a major wine production. In contrast to Germany their consumers prefer domestic wines. (Pilz, 2017) Germany is the largest importer of wine by volume in the world. Although the USA is ahead in terms of value, the German market imports the largest volume, namely 14.9 Mio hectoliter. (Meininger, 2016)

However, not everything that is imported stays in the country. Around 3 Mio hectoliter are re-exported, mostly in the form of low-price wines for the European food retail sector, which are bottled by the large German bottling wineries, such as Reh Kendermann or Peter Mertes, acting as subcontractors for the companies concerned. (Pilz, 2017) From the German wine production 1.032.000 Mio hl, with a value of 299.000.000€ were exported in 2015, mainly to USA, Netherlands, Great Britain, the Benelux states and the Scandinavian countries. (DWI, 2017) This leaves around 7.9 Mio hl of German wines for the German market, which are consumed domestically. Depending on the outcome of the German harvest, there are years with more demand for imported wines or less, which is important to realize for future importers.

Calculating the total volume of the German wine market, namely 20.6 Mio hl, against the population of 82 Mio German citizens, from infants to the elderly, results in a per capita consumption of 24.1 Liter, including sparkling wine. This shows that Germans are at rank four of the per capita consumption worldwide after the USA, France and Italy. They consume more than British, Spanish or Portuguese people. In comparison to the previous year 2014 the German per capita wine consumption increased about 1%. The wine consumption in Germany is slightly increasing looking at the data over the last 25 years and shows the rising potential of the market. (DWI, 2017)

Sparkling wines accounted for approximately four liters of the total per capita consumption, including 12 Mio bottles of Champagne (Meininger 2015). At private celebrations as birthdays and family gatherings – especially New Years Eve - but also at formal occasions sparkling wines are still a standard drink in Germany. The amount of 12 Mio Bottles Champagne shows the readiness of the German consumer to choose from a comparatively high price segment when special occasions are concerned. (Hoffmann, 2015)

Also worth to be mentioned is the consumption behavior depending on the season. It is common in Germany to drink more white wine during the summer, as it is more refreshing and often mixed with sparkling water, which is called a "Weinschorle", while red wine is more preferred in winter. (Hoffmann, 2015)

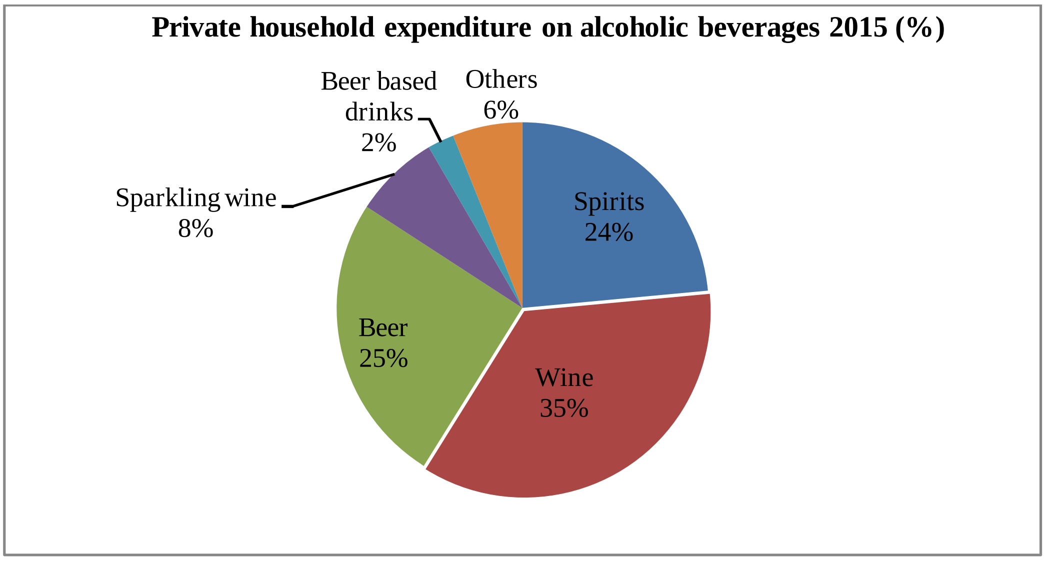

Figure 6 Private household expenditure on alcoholic beverages 2015 (%), own representation based on BSI, 2016

Shown in Figure 6 are the private household expenditure on alcoholic beverages, which accounted in total 13,6 billion Euro. The allocation in beverages shows that German households spend the most money on wine with 35%, followed by beer with 25%. (BSI, 2016)

Substitutes for wine are evaluated by the alcoholic beverages consumed in Germany per capita in liters. Clearly on the first rank is beer with 135,5 liter per capita in 2015, as Germany has a great beer culture, which is mostly practiced in the federal state Bavaria. Nevertheless the beer consumption in Germany is slightly decreasing, while the spirits consumption with 5,4 liter per capita is remained unchanged (DWI, 2017) and represents the biggest spirits market within the European Union. (BSI, 2016)

Although not a traditionally wine-drinking nation in the manner of France or Italy, over the last 20 years wine has become firmly established as an integral part of personal and business consumption. In particular, German consumers have been important early adapters of New World wines, while premium French, Italian and Spanish wines have maintained and expanded their respective market shares (Ammermann, 2013).

Figure 7 shows the top ten of German wine imports by country and outlines clearly that Italy, France and Spain are representing the most important importers in value and volume. While the price per hectoliter is outlining that France is the most expensive supplier with 299€ per/hl, as their premium wines are highly demanded in the German wine market. In comparison to the previous year, the New World countries are reaching more positive changes in value and volume, while the Old World importers are losing market share. Rising bulk wine import and the expansion of supermarkets and discounts are reasons for these changes. The list of further importers includes more than 70 different countries like Argentina, New Zealand, Switzerland, Romania, Israel or Turkey, which creates an exotic, liberal and divers market.

Country	Value 1000€	Volume hl	€/hl	Change 2014/2015 Value %	Change 2014/2015 Volume %
1. Italy	854.000	5.481.000	156	-1,8	-1,8
2. France	673.000	2.248.000	299	-9,8	-13,2
3. Spain	370.000	3.824.000	97	5,1	8,8
4. USA	102.000	493.000	207	8,4	-1,1
5. Southafrica	93.000	845.000	110	8,3	1,3
6. Chile	72.000	539.000	134	7,4	6,5
7. Austria	61.000	308.000	199	4	6
8. Australia	58.000	446.000	129	13,1	13,2
9. Portugal	34.000	153.000	226	-3,9	-6,5
10. Greece	18.000	99.000	186	-0,4	-1,4

Figure 7 Wine imports by country of origin (DWI, 2017)

In total the European Union states imported 12.284.000 hl, while other countries imported 2.678.000 hl (DWI, 2016) Of the imported wines 58% are red wine, 33% white wine and 9% Rosé. While the German wine production provides 49% white wine, 39% red wine and 13% Rosé, which explains the higher demand of red wine. (Hanf, 2017)

The German wine market is considered to be one of the most liberal in the world, related on the one hand to the huge import beside the domestic production, but on the other hand to the peculiar structure of German retail stores. Germany is one of the few countries in the world with a huge diversity in wine distribution, (Hoffmann, 2014) which will be outlined in the following chapter.

4.3 Distribution channels of the German wine market

To understand the content and to point out the relevance of this chapter a definition of distribution channels will be outlined. Furthermore the different sectors in the German wine market will be described and analyzed to create a market intuition for Companhia das Lezírias and to generate their right choice of channel in the end.

Channel of distribution is defined as: The route along which goods and services travel from producer, manufacturer through marketing intermediaries (such as wholesalers, distributors, and retailers) to the final user. Channels of distribution provide downstream value by bringing finished products to end users. This flow may involve the physical movement of the product or simply the transfer of title to it. Also known as a distribution channel, a distribution chain, a distribution pipeline, a supply chain, a marketing channel, a market channel, and a trade channel. (Ostrow, 2009, 59).

From the standpoint of economic operators, decisions on marketing channels are considered to be most important, since the chosen channels directly influence all other marketing decisions. Similarly, decisions about marketing channels imply relatively long-term responsibilities to other companies (Kotler, 2001, 529).

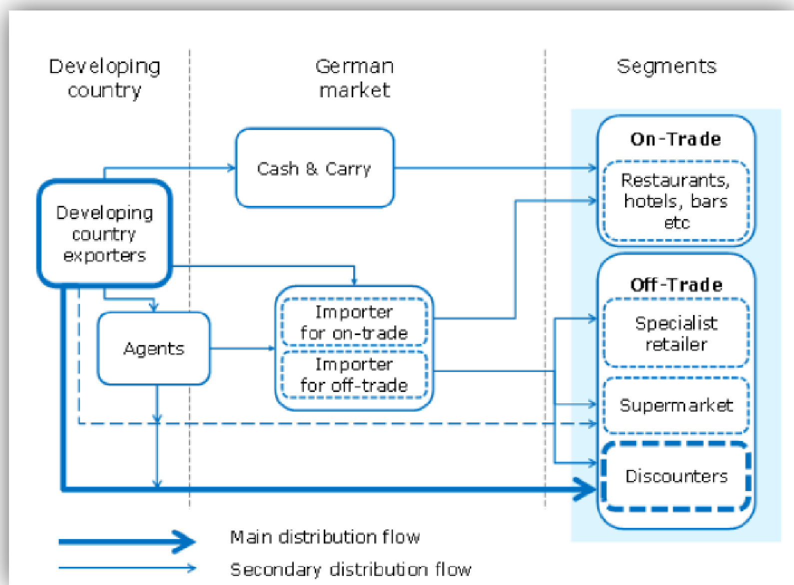

Figure 8 Distribution channels for wine in Germany (ProFound, 2016)

Although there are several small importers trading specialized wines, high-volume trade is dominant in Germany with discounters and supermarkets accounting for more than 60% of wine sales. The high-volume trade is in the hands of a few large importers such as Hawesko, Schenk, Mack & Schühle, Owen/Teck, Tophi, Racke and Eggers & Franke. (ProFound, 2016)

In recent years, German buyers increasingly import bulk wine. This results in a higher dependence among producers and exporters on buyers, which increases the risks and results in tougher bargaining positions. The dominant position of traders and the high-volume trade by discounters is expected to remain this way in the coming years. (CBI, 2016) This market development is also reflected of the partition of the different retail sectors: The food retail sector, including both the discounters and the supermarkets, accounts for about 50% to 60% of all wine sales and a large part of the sparkling wine sales. The remaining 40% to 50% of the market is divided among wineries that sell directly to their customers, the restaurant trade and specialist wine retailers. Around 15% of all the wine in Germany is sold via the restaurant trade, about 10% via the specialist trade and 15% to 20% of all wines are purchased directly from producers (Meininger, 2016).

In total numbers the German wine market is making wine available through (CBI, 2016):

14.000 discounters

10.500 super- and hypermarkets,

4.000 wine shops (70% individuals)

50.000 restaurants with wine (90 % individuals)

8.000 wine estates (direct marketing)

111 wine cooperatives (direct marketing)

offers through the internet

The HoReCa industry, which accounts for more than 3 Mio hectoliter of the total volume consumed in Germany, is rarely accessed directly from abroad. It obtains its German wine in part directly from the winegrower, and from abroad through importers, specialist wine and beverage dealers, and cash and carry markets, and in some cases from several of these channels simultaneously. (Luso, 2015)

This means the premium retailer outlets take on greater significance. While the discount sector, in particular, together with the food retail sector, serves the very low price segment, the specialist trade and mail order sector fulfils two important roles: Firstly the sale of higher-priced wines. Secondly the shaping trends as an opinion leader. The introduction of wines from unknown countries typically only takes place in the food retail or discount sector after they have been successful in the specialist trade sector. It should be noted, however, that specialist traders or mail order companies are regionalized and atomized to a far greater extent than food retailers and discounters (Meininger, 2015).

Taking a closer look to the specialized retailers, there are 570 franchise stores out of 17 chains, while there are 4006 individual wine stores. (Hanf, 2017) These numbers are showing that the wine specialty store market is very heterogenic and with a high intensity of competition, caused by different interests and company strategies. The most important franchise stores are listed in the following figure 9, which outlines that "Jaques' Weindepot" is the largest specialist retail chain with 280 shops. Besides wine the consumers are able to purchase champagne, spirits, liquors, oils, vinegars, delicatessen, that suit to wine and gift items. The average price per liter of specialized retailers with 7.69€ represents the premium wine segment and also reflects that their clientele is less price sensitive. (Hoffmann, 2015)

This is also shown in a survey about the premium wine market in Germany, performed by Prof. Hoffmann of the university Geisenheim. With its framework it was shown that specialist wine shop consumers are willing to pay in average 4,01€ per bottle for their every day consume and 7,91€ per bottle for special occasions and especially as presents. (Hoffmann, 2008)

Which shows great advantage for the wine brand "Tyto Alba" as its packaging and the premium price indicate an ideal gift purchase. The packaging is also becoming more relevant. In times of nostalgia and increasing consumer uncertainty, values like tradition and heritage are on the rise. Wines with stories and exciting winegrower personalities especially offer the specialized trade a plus (Rouchy, 2017).

Name of the wine shop	Concept	Portuguese Wines listed	Quantity
Jacques' Weindepot	Selling wine like directly from the winery, professional shop assistants	Four Portuguese wines listed: From Setubal, Vinho Verde, Dao, Porto. Price range: From 5,20€ - 12,95€	280
Vom Fass	Wines from the barrel, to self bottle them, as well as bottle selling	Six Portuguese wines listed: All Port wines. Price range: From 10,95€ - 44,50€	152
Gallier Weinhandel	Spirits, delicatessen, oils, vinegars and international wines	One Portuguese wine listed: Douro (6,90€)	41
Vino	500 wines from all over the world	Seven Portuguese wines listed: Douro, Vinho Verde, Doa, Ribatejo dem Tejo. Price range: 5,99€ - 15,99€	18
Weinland Mövenpick	Classic, international wines	24 Portuguese wines listed: Douro, Alentejo, Porto, Dao, Vinho Verde. Price range: 7,50€ - 499,00€	14
Bacchus Wein der Welt	Wine brands, high premium	One Portuguese wine listed: Porto (16,50€)	8
VIF Wein erleben	Representing the winemakers, 600 wines from all over the world	35 Portuguese wines listed: From Alentejo, Douro. Price range: 5,95€-72,00€	6
Villa Vinum	Specialized shop with wine bar, combination of on - and off trade, spirits, oils, vinegars, delicatessen	10 Portuguese wines listed: Porto, Setubal, Alentejo. Price range: 25,00€-45,00€	4
Others			45
Total 17			570

Figure 9 Specialized retailers, Franchise wine shops in Germany and their Portuguese wines listed, Source: Own representation based on Hanf, 2017 and own research

The Portuguese wines listed in the specialist retail stores are mostly from the wine growing region Douro, Vinho Verde and Alentejo. Noticeable was the dominant presence of Port wines in comparison to Portuguese still wines. This indicates also that Portuguese still wines still account as a niche product in Germany and require more communication from sales man.

Specialist retailers are working hard to find new customer bases, present a more attractive assortment compared to supermarkets and have an innovative marketing and client approach, which outlines an advantage for "Tyto Alba", as it has a high level of differentiation and is standing for a special product with a special intention. Moreover, in contrast to the discounters and supermarkets, special retailers increasingly invest in online sales, attracting new customers. Even if there is a dominance of high-volume trade, more opportunities are also expected for higher quality producers in the specialist trade for the coming years. The off-trade share showed a declining trend until 2010, this segment managed to increase their market share slightly in the last few years, which is expected to continue in the coming years. (CBI, 2016)

The food retail sector is essentially divided into two areas: the discounters Aldi Süd and Aldi Nord, Lidl, Netto, Norma and Penny on the one hand and the supermarket trade on the other hand, now shared by the two major cooperatives that are managed as businesses, Rewe (Cologne) and Edeka (Hamburg). The third member of the supermarket trade is the Metro Group, which has been undergoing restructuring processes at its cash & carry stores and supermarkets for years. (Pilz, 2017)
Supplying bottled wine directly to supermarkets is difficult, due to high listing fees. In Germany, this fee (in the form of kick-backs and discounts) can be between 24-28% of the retail price. Working with supermarkets therefore requires good price calculations and involves high risks, as the sales quantities are not guaranteed. Importers are often a more suitable channel for exporters in developing countries. These importers are in a better position to comply with the requirements of retailers (CBI, 2016).

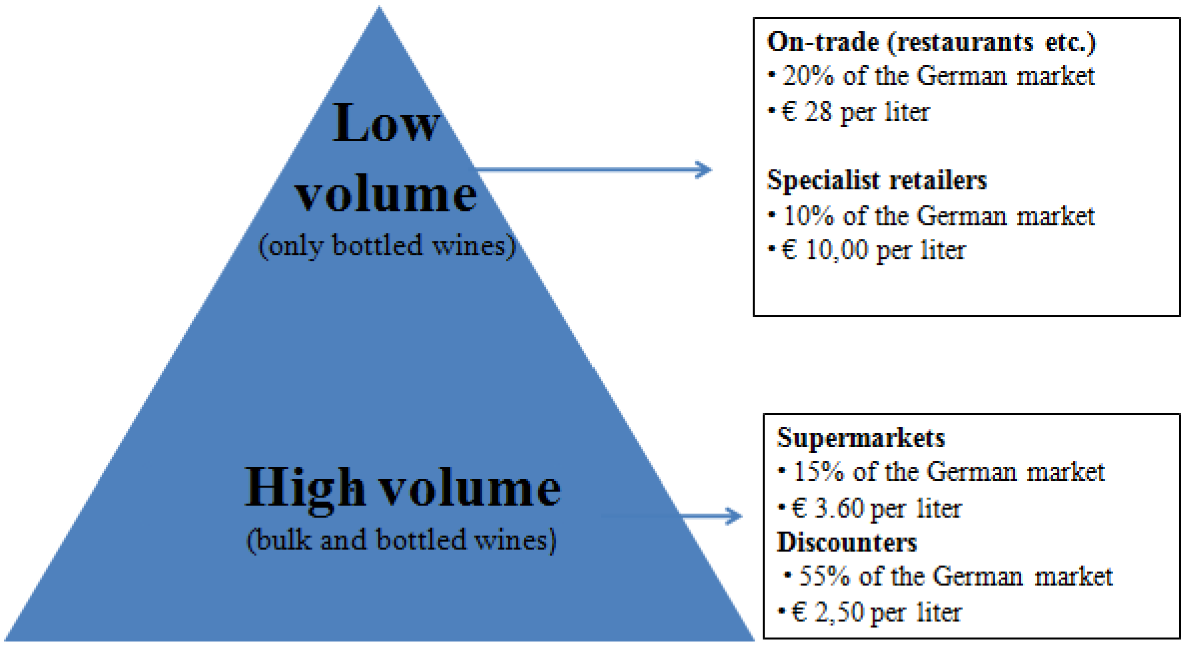

Figure 10 Market segments for wine in Germany, including indication of share in sales per segment and average retail price per bottle, own representation with data of Szolnoki, 2014

The University Geisenheim reevaluated the average prices per liter in the different shopping locations and came to the result pictured in Figured 10. Taking also the direct sales, with an average price of 5.50€/Liter, and the internet sales, with an average price of 10.00€/Liter into consideration, the survey came to the conclusion that the premium wine market (over 5€/Liter) in Germany has a market share of 60% in terms of value.
Consequently Germany is representing an important premium wine market. (Szolnoki, 2014) This discovery is crucial, as the general impression of the German wine market results in a discount driven market with extreme price pressure. The result points out that the distribution channels differentiate each other strongly and that the German wine consumers are willing to pay more for premium wines.

Thereby the potential for the wine brand "Tyto Alba" is considered as high and outlines opportunities in the German wine market.
Not mentioned in this chapter yet, but rising in importance and market share, is the Online wine market in Germany. The first market survey about wine online sales was made in 2014 by the market research institution GfK and resulted in an online sales market share of 5%. This corresponds to approximately 45 Mio liters of wine with a value of 300 Mio Euro. With an average price per liter of wine of 6.68 Euro, the online price level is comparable to the specialized retailers and much higher than the prices of the supermarkets. (GfK, 2014)

All in all the German wine market presents significant opportunities for European and New World wine producers. Its large size and its relative economic stability provides a strong foundation for growth. Yet the market is tremendously varied, and the high costs of market entry, together with low pricing and high competitions, means that a regional market strategy is required (Ammermann, 2013).

Very special is the federal structure on the German market, which is relatively complex and time-consuming to deal with. It is known for its price sensitivity and the strength of the discounters. (Rouchy, 2017). Nevertheless this structured and relatively saturated market opens up possibilities for new concepts as represented by "Tyto Alba". Numerous niches exist in the distribution channels of the German wine market where specialties and premium products find a ready market.

Patience and a long-term approach are needed to enter the German wine market, as it is not a spot market. Suppliers, who prove to be reliable, flexible and solution-oriented partners have great chances of enjoying successful, long-term relationships (Rouchy, 2017).

4.3 Positioning of the Portuguese wine in the German market

Concerning the German wine imports in 2015 Portugal is placed at the ninth rank with a volume of 153.000 hl, which results in a total market share of 1.02%, and a value of 34.000 Euro (value in 1000€), which results in a market share of 1.4%. It is interesting to see that Portugal, in terms of price per hectoliter, namely 226€/hl, reaches the second highest price relation directly after France. (DWI, 2016)
Even if Portuguese wines had a decline of -6.5% in volume and -3.9% in value in 2015 it is important to take a look at the numbers of the previous year, which represents a positive change for the Portuguese wines in Germany, as in the year 2014 the Portuguese wine economy was entering the German wine market with a positive development. With a surplus of 19.7% in volume and 14.3% in

value, 2014 is the first year of an enormous growth of Portuguese wines in the German wine market and reflects a growing interest and awareness in the German wine market. (IVV, 2015)

Mike Veseth from the Wine Economist divided the Portuguese wine export market in three categories: Very interesting to see is that Germany is placed on the 8th rank of Portugal's wine export countries, after France, UK, USA, Angola, Belgium, Netherlands and Canada. This ranking is representing the bottled wine exports including table and Port wines. But looking only at the Port wines exported, Germanys position switched to rank six. Even more significant: looking only at the bulk wine exported from Portugal, Germany is to be found on rank three. (Veseth, 2016)

From these data, namely 13.832.744 liter of total wine exports to Germany, 2.963.870 liters of exported Port wine and 7.015.454 liters of bulk wine, it is possible to identify the bottled wine exports to Germany, which account 3.853.420 liters. Consequently the categories of the Portuguese wines on the German wine market are divided in:

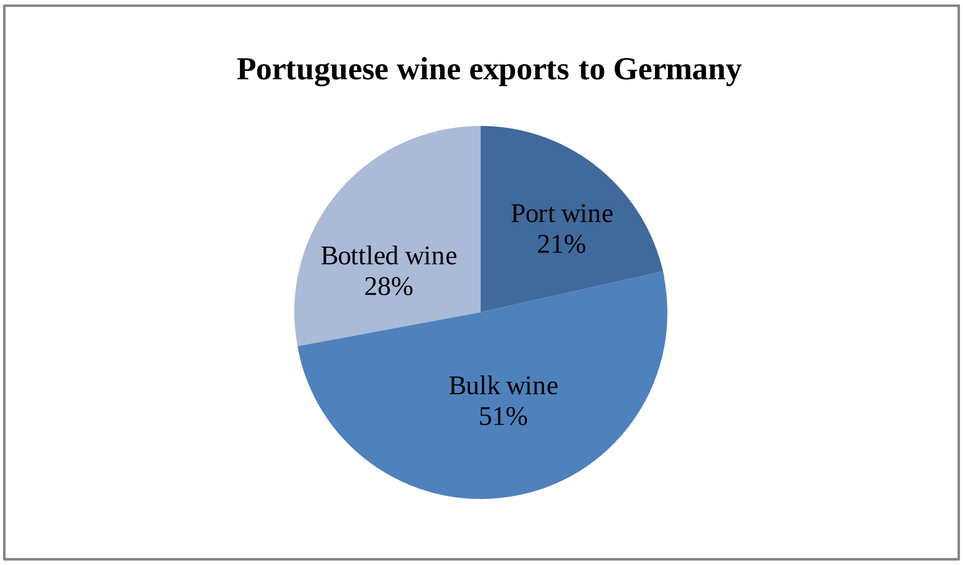

Figure 11 Portuguese wine exports to Germany in categories, Own representation based on Veseth and IVV, 2016

The Portuguese bulk wines account for 51% on the German wine market, while the bottled wines make up 28% and the Port wines 21%. This reflects Germany as a the described bulk wine market and also shows that the bottled wine market of Portuguese still wines in Germany is relatively small.

The inventory of Portuguese wines in selected distribution channels, implemented by the research institute Geisenheim, showed that there are more cheaper white and rose wines, which are mostly available in the German supermarkets, while more expensive red wines are to be found in the specialist retail stores, who define Portuguese wines as their peripheral assortment. (Rosário, 2001) This points out that Portugal as a high quality red wine producer is not yet arrived at the German wine market and also explains the big amount of bulk wine imported to Germany.

Several specialized retailers were interviewed in the German wine magazine "Weinwirtschaft" about the potential of Portuguese wines in Germany and are mentioning that the overall acceptance of higher value Portuguese wines is increasing, especially for the wine growing regions Douro, Bairrada and surprisingly Alentejo. Also interesting to point out, is the increasing success of medium and premium priced Portuguese wines, which are best to establish and most successful in the specialist retail stores. (Luso, 2015)

Another outstanding and often discussed topic concerning Portuguese wines is their diversity of grape varieties. Portugal has a large variety of native breeds, producing a very wide variety of different wines with distinctive personality. With all these characteristics one thing must be done: Internationalization (Patricio,2012). While some experts see an internationalization as necessary, German specialist retailers see a huge advantage in the mixture of domestic and international varieties and the diversity of Portuguese producers, as they get the opportunity of new wine discoveries, and as they can count on a constant quality, especially in the medium price segment. (Schwarzwälder, 2015)

The master thesis research of Lisa Maria Henne, at Instituto Superior Agronomia, in 2015 named "How the Portuguese wine can further penetrate the German wine market" had the objective to identify the expectations of experts and consumers in the German market in regards to Portuguese wine, to understand the attributes that are of high importance to them as well as the procurement process for their respective wine trade. The data analysis showed that the experts surveyed:

- have a very favorable impression about Portuguese wine in terms of quality and price-quality ratio
- connect the flavor profile which is likely to be sold with refreshing frothy white wines as well as slender and classy red wines.
- consider it as important to provide easy approachable basic wines. (Henne, 2015)

A further important aspect reflected in the results is the missing intellectual bridge between the consumer and the Portuguese wine. Therefore sales are made more difficult when compared to other countries. The sales personnel as well as the consumers are given to less chances to learn more about the country and its wines, as the most important sales promoter is the sales personnel themselves as they have the biggest influence on the final wine choice. (Henne, 2015)

Interesting to see is that the marketing responsible institution "Wines of Portugal" is reacting to this specific problem through tastings and events, for example the "Wine Campus" in Hamburg, which took place in November 2016 and presented 75 Portuguese wine producers, with the opportunity of wine tastings, workshops and consequently created a strong communicative policy.

An additional very positive information is the publication of a leading article of one of the most important German wine magazines "Weinwirtschaft" about the wine growing region Tejo, where Companhia das Lezírias is situated. The article was published in February 2017 with the headline: "Tejo -Zwischen atlantischer Frische und kontinentaler Kraft" - "Tejo-between Atlantic freshness and continental force". It provided all information about the region, its soil and varieties and is reporting about its' the extreme potential. The magazine is mostly read by wine experts and wine retailers. This fact shows, that the German wine market is aware of the potential of the Tejo region and that the interest by wine experts is increasing. (Weinwirtschaft, 2017)

In general the German wine market is extremely liberal on the one hand and very competitive on the other hand. The Portuguese wines have a great potential in the market, especially in the specialist retail stores and in supermarkets, where medium to premium wines are available. Nevertheless it is important to point out that Portugal has many small wine producers, which creates higher prices, through higher production costs. Still the chance of Portuguese wines as a niche product are high.
Reasons for Portuguese wine producers to export to Germany are to differentiate their markets, to guarantee their international presence. Reasons for that are the intensive competition in Portugal, so that the domestic market is not sufficient.

The following points are underlining the advantages of exporting Portuguese wine to Germany:

> Germany is the largest wine import market in the world
> Purchase power of the consumer and relevance of the market are assured
> Germany is a liberal and organized wine market with rising per capita consumption
> Germany doesn't have a major domestic red wine production
> The geographic proximity
> No trade barriers within the European Union
> Awareness level of Portuguese wines through rising German tourism
> No wine tax in Germany

While disadvantages for Portuguese wine producers in Germany are considered as:

> The weak image of Portuguese wines
> Missing information for the final consumers
> A missing Portuguese high-class gastronomy in Germany
> No market aggression by the Portuguese wine industry
> Unknown Portuguese grape varieties

5. The German Wine Consumers Analysis

An important basic rule is to understand market and distribution structures as well as the consumer preferences and trends. In Germany the competitive pressure is high from other countries. It is therefore even more important to offer the right product to the right target group through the right distribution channel (Rouchy, 2017).

As wine increasingly becomes a lifestyle beverage and more acceptable and desired by a wider spectrum of consumers, there is a greater need to understand wine consumption patterns and profiles and consumer values, the dynamics of consumer behavior. Essential to the understanding of consumer behavior, and to convert this understanding into successful marketing strategies, is the adoption of a sound market segmentation approach (Bruwer, 2004). Several variables can and have been used to describe wine consumer markets, often in terms of consumer behavior. In conclusion, the need of marketers is to segment the wine market using the most appropriate segmentation basis, then target the most actionable segments with the right brand (Charters, 2014).

Therefore the segmentation of the German wine consumers will be the frame of this chapter and will outline the socio-demographic criteria like age, region and social classes, as well as product criteria like preferences of wine origin, color and flavor and consumption intensity. Aim of this separation will be the creation of homogenous groups of consumers, which will be the basis of a strategy formation, the evaluation of the target group and the positioning of the product "Tyto Alba" in the German wine market. It also functions as a tool to identify which wine type is the most suitable for the German market as "Tyto Alba" is available in six different versions.

First of all the general consumption behavior of the German wine consumers will be outlined, to get a general impression of their preferences. After that special segmentations will be shown with a special focus on the preferences of the shopping location to identify the best distribution channel possible for the wine brand "Tyto Alba" and characterize the possible target group in the end. The data, which will be presented are the latest survey of Prof. Szolnoki of the university Geisenheim "The German Wine Consumers Segmentation" which was performed together with the market research institute GfK and included 2.068 participants.

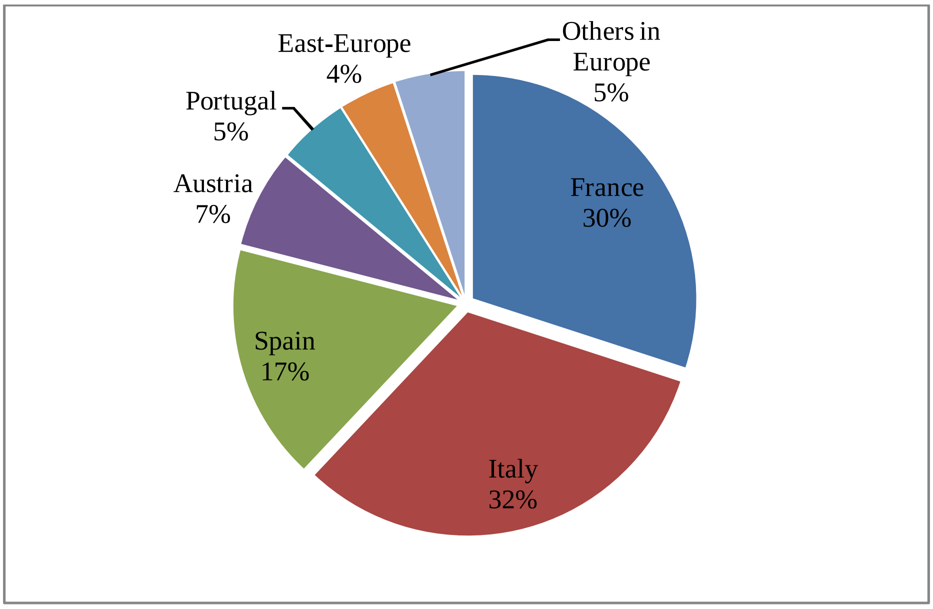

Figure 12 Consumer preferences of European wine countries (Szolnoki, 2014)

As a start the consumer preferences by country are evaluated. Taking only the European countries into consideration the consumers prefer mainly wines from France, Italy and Spain, followed by Austria. Portugal is preferred as a country of origin with 5%. That reflects that Portugal is considered as a smaller supplier, who wants to expand sales on the intensive German wine market. On the other hand it points out the biggest competitors on the market. Preferred wine countries from the New World were Chile, South Africa and Australia. In general 58% of the consumers prefer German wines while 42% prefer foreign wines. (Szolnoki, 2014)

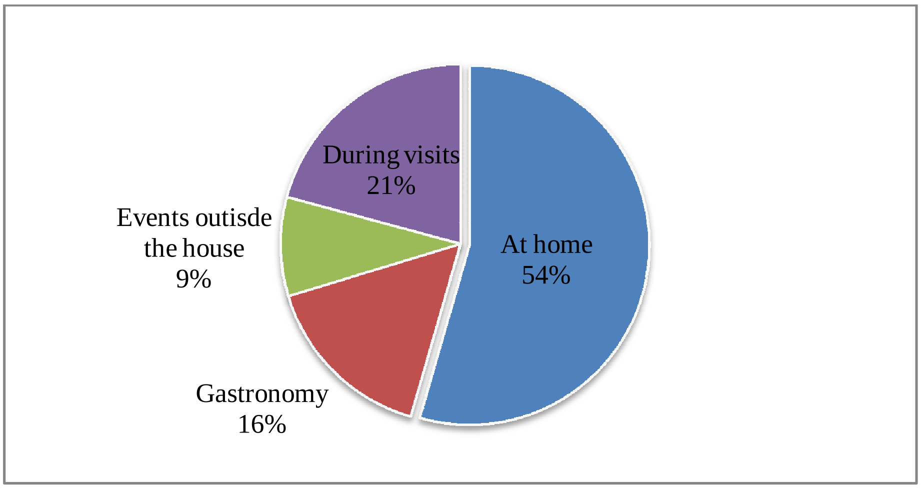

Figure 13 Consumption places of wine (Quantity share in %), (Szolnoki, 2014)

The structure of the consumption places outlines very clearly that German people mostly consume wine at home. Counting the consumption during visits with 21%, which also takes place at home, together with the home consumption of 54%, demonstrates that approximately 3/4 of the wine consumption happens at home. A very interesting distribution is also shown at the outside the house consumption of events and gastronomy. That the gastronomy only reaches a market share of 16% indicates how strong the consumption is practiced at other places and how distanced consumers are towards the wine consumption in the gastronomy. The market share of the wine consumption during visits and events speaks for a high social binding effect, as the consumption takes place in a bigger social surrounding.

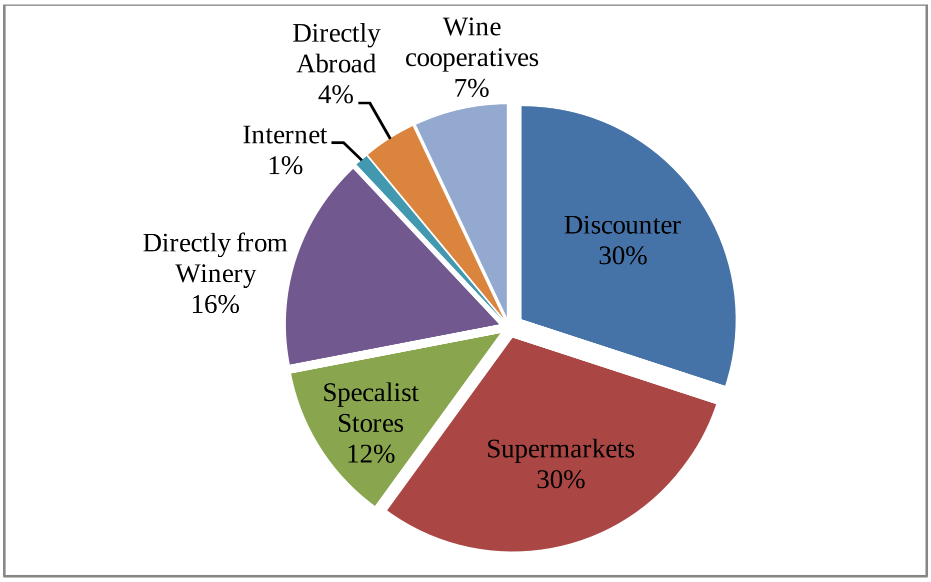

Figure 14 Shopping location for wine (Quantity share in %), (Szolnoki, 2014)

The structure of the preferred shopping location, shown in Figure 14, is referring to the quantity share and not the number of persons. This is important as significant differences were discovered, as the market share of the discounters decreases from 36% (number of persons) to 30% (quantity share). So the distribution of the preferred shopping locations points out firstly the divers utilization of different locations of the consumers and secondly the overestimated importance of the supermarkets and discounters. This confirms that more premium orientated shopping locations as wineries, specialist stores, internet, cooperatives and purchases abroad are gaining importance.

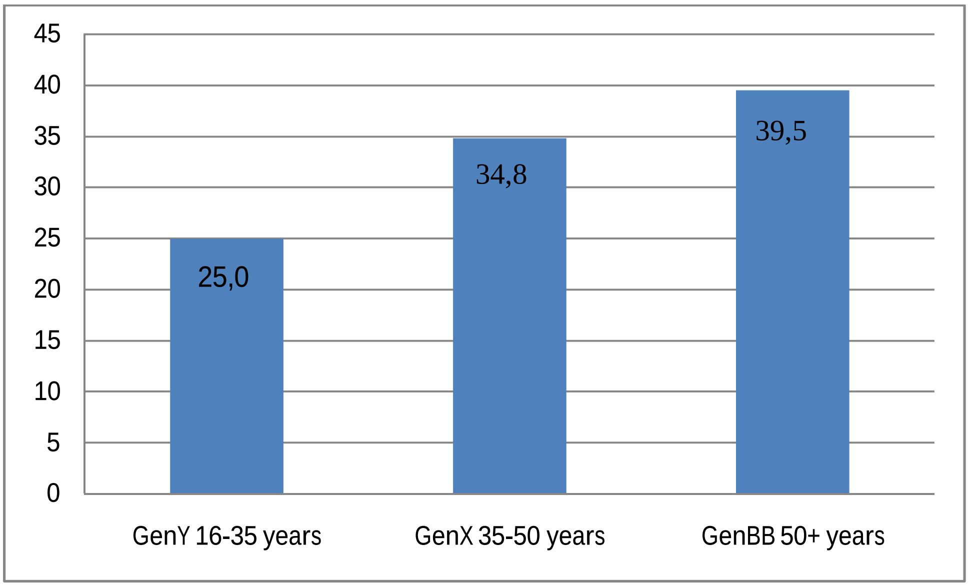

Figure 15 Annual per capita consumption in liters per age segmentation (Szolnoki, 2014)

In accordance with a lower consumption intensity the younger generation reaches a per capita consumption of 25 liter per year. Shown in Figure 15. Clearly pointed out are the two older generations X and BB. These two generations are the most important wine consumers in Germany and have a higher knowledge and interest in wine. (Szolnoki, 2014)

Very interesting in this context, is that the oldest generation of the Baby Boomers, who are over 50 years old were defined as the classical wine drinkers, who enjoy to talk about wine and who inform themselves mostly about wine. Their flavor preferences are dry wines and they mostly consume wine at home. Also important to point out is that they are the group who are mostly buying wine in more expensive shopping location, such as directly from the winery, specialist retail wine shops, wine cooperatives and supermarkets. This is also reflected in the purchase criteria of price, as the oldest generation pays less attention to the price in comparison to the young generation Y. (Szolnoki, 2014)

Another important aspect of the German wine consumers were the purchase criteria of wine. The most important criteria were declared as: grape variety, wine brand and flavor, country of origin and wine growing region. The most significant purchase criteria was the flavor. (Szolnoki, 2014)

Concerning the segmentation of gender there are some differences highlighted: in terms of wine types women prefer more white and rose wines while men tend to prefer red wine. Sweet red and white wines are much more preferred by women, while men have a higher preference for dry red or white wines. Both, German men and women declared the image profile of wine as "a nice companion to food", "a good gift" and "perfect for evenings with friends". (Szolnoki, 2014)

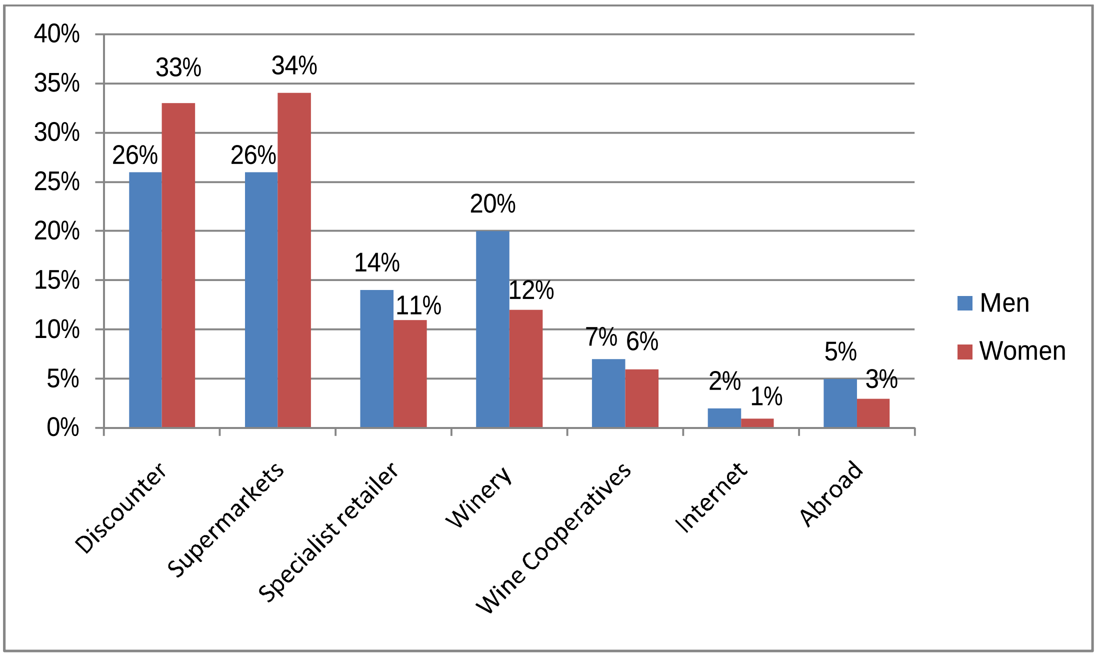

Figure 16 Preferred shopping location of men and women (quantity share in %), own representation based on Szolnoki, 2014

The analysis of the preferred shopping location of men and women outlines, that men buy 20% directly from the winery, while women are represent only 12% for this distribution channel. In contrast to that is a notable higher share of women in discounters with 33% and in supermarkets with 34%. This signalizes that the household purchases are more often made by women. While the purchases in wineries and in the specialist retail stores are mostly done by men.

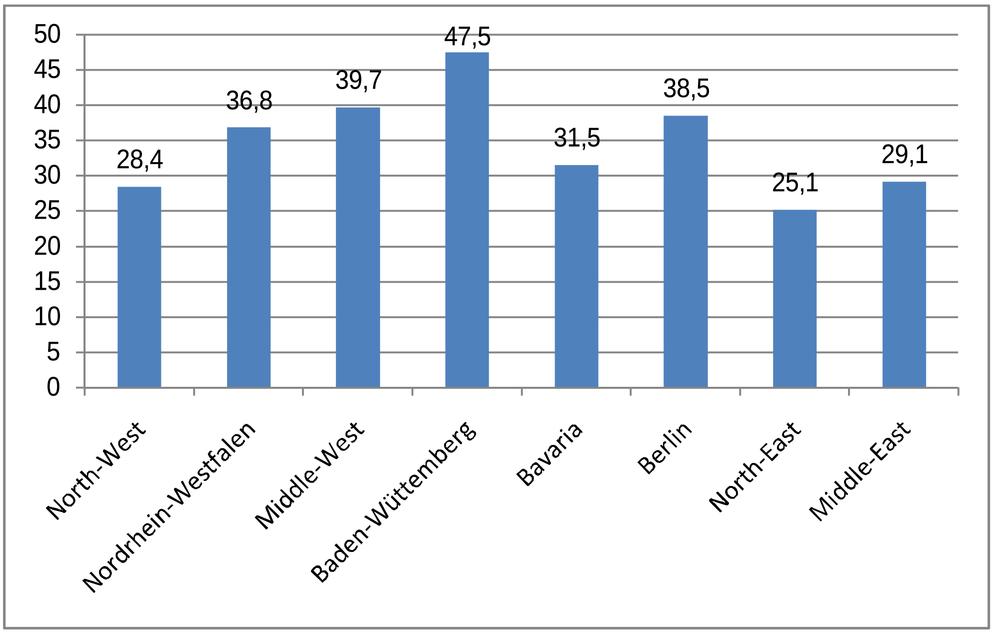

Figure 17 Annual per capita wine consumption in liter of the regional segments in Germany, own representation based on Szolnoki, 2014

The annual per capita wine consumption per region segment is showing major regional differences. In the region Baden-Wüttemberg the highest per capita consumption is taking place with 47,5 liter. Also the segment Middle-West, which represents the federal states Hessen, Rhineland-Palatinate and Saarland demonstrates a high consumption of 39,7%. This higher consumption frequency is also due to the fact that the German wine growing regions are located in the south of Germany. The regions Nordrhein-Westfalen and Berlin are also standing out with a per capita consumption over 35 liter. The low wine consumption in Bavaria is explained with their high beer consumption and their strong beer drinking culture.

The last and crucial segmentation, represents the segmentation by wine interest. This is from high importance as the wine "Tyto Alba", with its country of origin Portugal, which is considered as a special, exotic origin, its special and detailed background history and the outstanding packaging, requires clients who are more interested in wine and who are willing to learn more about the product. Therefore the segmentation of interest, which is defined as involvement, was divided in low interest, average interest and high interest and was combined with socio demographic criteria.

Segment	Low interest	Average interest	High interest
Age			
< 26 years	12,8	7,8	4,6
26-34 years	12,2	13	7,9
35-49 years	30,3	25,3	28,1
50-59 years	16,6	16,6	22,5
>60 years	28,1	37,2	36,8
Gender			
Male	44,1	39,5	54,8
Female	55,9	60,5	45,2
Social Class			
A Upper Class	10,8	15,2	22,5
B Middle Class	17,5	16,8	18,5
C Lower Class	49,2	47	42,4
Region			
North-West	18	15	10,3
North-Westfalen	18,2	19,5	21,6
Middle West	11,4	13,2	19,3
Baden-Wüttemberg	14,8	10,5	14,3
Baveria	13	20,8	15,9
Berlin	4,6	2,9	4
North-East	10,2	8,7	7
Mittdle-East	10	9,4	7,6

Figure 18 Socio demographic profile of the Involvement segments (in %) own representation based on Szolnoki, 2014

The outcome of the wine involvement segmentation is very interesting and points out, that wine interested people are older than 35 years. There are more men interested in wine, who come from a higher social class, who are higher educated with closed up university degree and they live mostly in the federal states Rhineland-Palatine, Hessen and Nordrhein-Westfalen. This is a crucial information that makes it possible to localize the target group and to act in a narrowed area in Germany. Furthermore the group of high interested consumers spend the most money on wine, which was evaluated in the average price per liter, which resulted in 5,30€/Liter. This indicates that the high interest wine consumers are more premium wine orientated.

5.1 Target Group

The evaluation of the target group is highly important and will point out the potential of the wine brand "Tyto Alba" in Germany and is mainly necessary to locate the most suitable consumer group on the German map on the on hand and to identify the best distribution channel in these regions. This will simplify a successful market entry for Companhia das Lezírias and the work of the export company "Wines and Winemakers by Saven".

Combining the information of the market research, the German wine consumer analysis and "Tyto Albas" product features, the following consumer profile could be evaluated:

- Nature affine and awareness of sustainability of the consumer
- Higher education level
- Higher income to generate the premium price level
- Consequently situated in the upper class
- The wine drinking generation from 35-60 years and above
- Male consumers: as they prefer to buy wine in premium shopping locations
- Female consumers: as they buy premium wines as gifts and presents

To define and to name this group of people, the German research institute Sinus for market and social research developed a differentiation of the German society. The Sinus-Institute bases its determination of target groups on an analysis of the different life worlds in our society. Unlike traditional social stratification or lifestyle models, this is a socio-cultural classification. Basic values that determine lifestyle and goals in life are taken into account, along with everyday attitudes towards work, family, leisure and consumption. The Sinus-Milieus thus highlight the individual within their life world as a holistic frame of reference (Sinus, 2015).

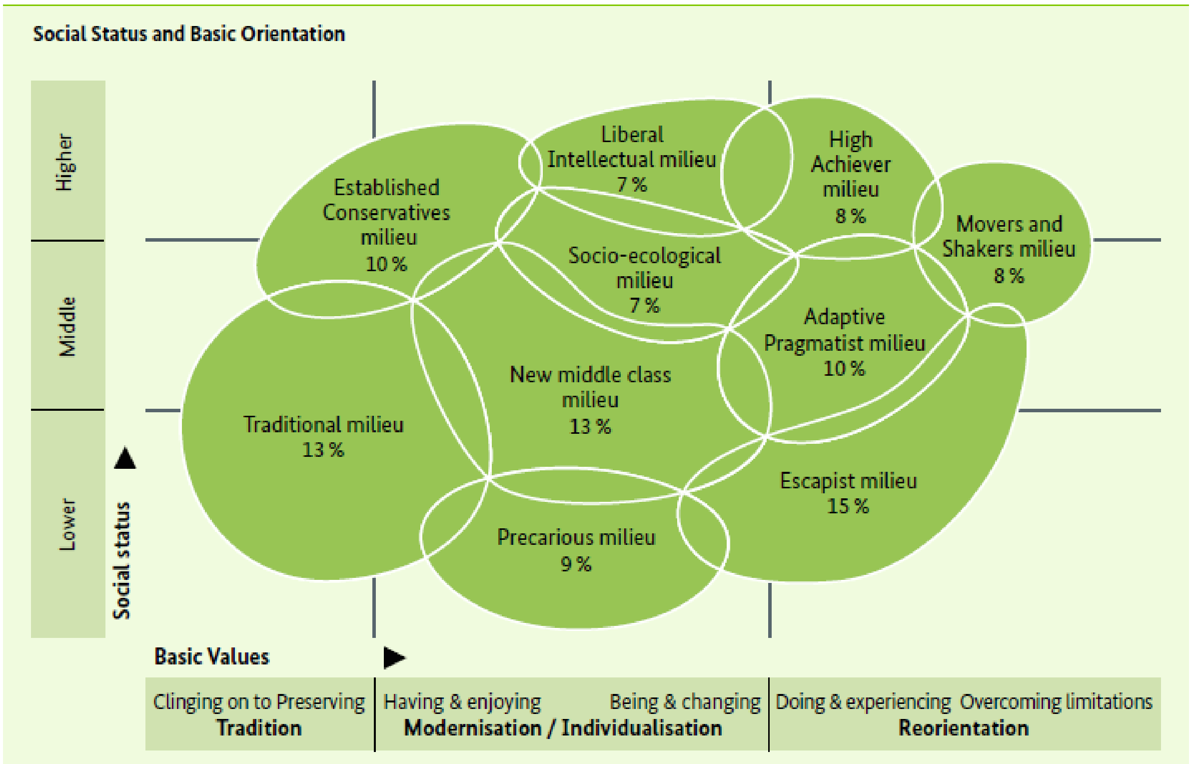

Figure 19 Sinus-Milieus of the German society, (Sinus, 2015)

Taking the Sinus Milieus into consideration and combing them with the analyzed consumer characteristics resulting of the German wine market circumstances, two groups are outstanding and representing the target group most suitable for the wine brand "Tyto Alba":

Firstly the Liberal Intellectual milieu is the enlightened academic elite, with a liberal, cosmopolitan outlook on life, post-material roots and the desire to lead a self-determined existence. Their view of the world is based on global thinking and detachment from any kind of ideology. Its members regard the growing complexity that comes with a global world as a challenge, and they endorse cultural pluralism. This milieu typically seeks intellectual stimulus via art, music or culture. Liberal Intellectuals accept the meritocracy, but also feel duty bound to work towards a better and fairer world. (Sinus, 2015)

Their socio demographic attributes are:

- Middle age groups: focus 40 to 60, average age: 46
- High level of formal education; highest percentage of university degrees of all the milieus
- Often married, with children in the household
- Disproportionately high number works full- or part-time; above-average number of independent professionals, along with many highly qualified company employees
- High net household income

Secondly the Social Ecologicals, who follow the principle of sustainability when it comes to consumption, generally aiming to follow a rigorously ecological lifestyle on a daily basis in areas such as nutrition, living, energy and mobility. However, they are not hostile per se to technology and accept, for instance, innovative technologies that tackle environmental problems. (Sinus, 2015)

Their socio demographic attributes:

- Broad age range: 35 to 60; average age: 50
- Women over-represented
- High level of formal education

As the winery Companhia das Lezírias has a very strong philosophy about sustainability and is communicating this characteristic also on the wine label with the aid of a green sticker it was obvious to focus on consumers, who are aware of the topic sustainability and biodiversity. Very interesting in this context is the" Nature Awareness in Germany" study implemented by the Federal Ministry for Environment and Nature Conservation. They found out that 41 percent of Germans know the term ‘biodiversity’ and are able to explain it, which indicates an active knowledge, while 53 percent meet the attitude criterion, meaning they are sufficiently aware of the need to preserve biodiversity, and 59 percent express their willingness to play their own part in protecting biodiversity. (BFN,2015)

Within this study the sinus milieus were used to identify the groups in society, which are most aware of sustainability and biodiversity. The outcome were the two groups: The Social Ecologicals, as well as Liberal Intellectuals. This verifies the right choice of target group and proves the potential of "Tyto Alba" in Germany and will help to find the right strategy to penetrate the German wine market.

Where are these groups of wine consumers situated? Already mentioned in the chapter of the wine consumer analysis three federal regions in Germany were pointed out that corresponded to the product features of the wine "Tyto Alba" as well as the differentiation of the Sinus Milieus. These three regions are Rhineland-Palatine, Hessen and Nordrhein-Westfalen. The advantage of these regions implement less price orientated consumers, high living standards, highest purchasing power, smaller cities that are closer to nature and they are the most wine affine regions.

The selected information and analysis of the German wine market as well as the analysis of the German wine consumer will flow into the four marketing strategies, developed in the next chapter, with the aid of the TOWS-Matrix.

6. The SWOT Analysis

SWOT analysis is a tool for auditing an organization and its environment. It is the first stage of planning and helps marketers to focus on key issues. SWOT stands for strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are internal factors. Opportunities and threats are external factors.

The aim is to create four strategies that result out of the TOWS Matrix, which are created out of the confrontation of the external and internal factors. In the following part the strengths and weaknesses, as well as the opportunities and threats will be summarized and outlined, to ensure a clear understanding of the created TOWS Matrix, which will then create four strategies developed out of the companies and the wine brand "Tyto Alba" characteristics, as well as the analysis of the German wine market and the German wine consumers.

6.1 Strengths and Weaknesses

Companhia das Lezírias can point out a strength through their strong philosophy about sustainability and the way they communicate to their customers, who are getting the chance to understand the process of winemaking by visiting the winery.

The winery is financially stable and is ambitious concerning new goals and the expansion of their name recognition. With the creation of the wine brand "Tyto Alba" a strong statement of the label is given with the aid of the owls eyes as an eye catcher, which stays in the head of the consumer. Also the wines slogan "Such a secret is worth sharing" is speaking for itself. The barn owl, as the figurehead of the winery acts as a symbol of their philosophy and generates a background story to tell and functions as a selling argument. A bird nest box as packaging is a unique selling point and makes a differentiation against competitors possible. It represents the perfect present for special occasions and also gives the costumer the chance to retell the background story of the wine, which suits to social surroundings.

The "Tyto Alba" range is diverse in price policy and availability of grape varieties and wine types, which makes it flexible on several different markets and can individually react to the preferences of retailers and importers.

On the other hand the philosophy of sustainability is not confirmed through an official certification as the "ABC 2020" is based on the own commitment of the winery. Even if it makes the impression of an association certification, there are no information possible to find on the internet, solely on the wine brands homepage "Tyto Alba". This could create confusion from consumers and clients point of view, which was seen in the example of a German wine online shop, which declared the wine as a "Bio"-wine. In this context it would be the task of the export company "Wines and Winemaker by Saven" to control the brands image and expertise in their export destinations. This indicates a lack of communication between the wineries marketing section and the export company and could lead to a loss of control of the brands image.

The online representation of the wine "Tyto Alba" on Facebook has a strong cooperate design and refreshes the brands image to clients who are already aware of the wine. While the homepage of "Tyto Alba", the internet source firstly visited by new clients, could provide more information. Especially the connection of "Tyto Alba" and the winery Companhia das Lezírias is not pointed out there.

Also not existent is a direct online shop on the brands page. The winery Companhia das Lezírias also does not have a separated homepage with all their portfolio listed, instead they are only a category on the general homepage of Companhia das Lezírias, which makes it difficult for consumers to have a clear understanding of the winery and to find the winery easily online.

6.2 Opportunities and Threats

In general Germany is an economical and political stable country, with a focus on sustainability and technology. Export business relations efforts a trustworthy and responsible way of working with precision in delivery periods and a constant quality of products. This can be seen as an opportunity and a threat at the same time, as compliance of this conditions lead to long-lasting business relations, while unreliability lead to a quick end of contracts.

Germany is a country with a small domestic wine production and therefore developed to the biggest wine importing country worldwide by volume. By open minded consumers and a complex distribution structure the German wine market is considered as a highly liberal wine market. A rising per capita consumption is showing a big potential of the market, where changes and newcomers are welcome. Also outlined as an opportunity is the low red wine production in Germany, which demands foreign red wines and makes the consumer more flexible in the choice of country of origin. On the other hand the diversity of Old World and New World wines create a high market competition and complicates purchasing choices of consumers.

The federal complex structure of Germany can be seen as a risk, as there are major differences in wine consumption behavior and wine preferences. Without an intense analysis of the market structure and consumer segmentation a clear perspective is almost impossible. This risk gets compensated by narrowing the target group and identifying the three federal regions Rhineland-Palatine, Hessen and Nordrhein-Westfalen as regions with higher wine consumption and higher purchasing power.

Another opportunity is the knowledge of German citizens concerning sustainability and the awareness of nature as well as the rising importance of this topic in politics. In this change of thinking Germany is evolving into one of the leading countries of alternative energies. The consumption of Bio-food and Bio wines is rising in Germany and proves the importance of this topic by a consumers point of view, which enhances the chances for sustainable companies like Companhia das Lezírias.

A threat represents the dominance of the discounters, which create a high price pressure and carry out a high bargaining power on producers. On the other hand a premium wine market in Germany is present and shows enormous potential for niche products, specialties and innovations.

The fact that Portugal is a relatively unknown wine country, with a very low market share of only 1,4% in value, can be viewed as a threat, as it can push away consumers due to lack of knowledge and makes it more challenging for importers and distributors to communicate the product to the consumer. In this context the unknown Portuguese grape varieties are also a reason for this barrier. On the other hand it can also trigger curiosity in trying a new thing and addresses consumers, who are interested in specialties. Especially the distribution channel of the specialist retailers shows high potential in selling premium wines from unknown regions and declares a rising interest in Portuguese wines on the market. This rising interest is also originating from a rising number of German tourists in Portugal. After the British the German people are most present nationality as tourists in Portugal. As the Portuguese wine is a crucial part of the countries culture, German tourists are getting more educated about the product and are also responsible for the rising interest on the German wine market.

6.3 The TOWS - Matrix

The TOWS Matrix, which is pictured in Figure 20, is an effective technique and a combining tool resulting out of the SWOT-Analysis, that emphasize on the external opportunities and threats while analyzing the internal strengths and weaknesses of a company. As a result four strategies are created for the wine brand "Tyto Alba", to generate an optimal product implementation on the German wine market. The "SO-Strategy" is also known as Maxi –Maxi Strategy where a firm utilizes most of its internal strengths in order to connect to the right external opportunities. The "WO-Strategy" is also known as Mini- Maxi Strategy that can be used to overcome the weaknesses of a company by taking advantage of the opportunities. While the "ST-Strategy" is where a company through its strengths can avoid any kind of external threats. Lastly the "SW-Strategy" or Mini- Mini Strategy is reducing the level of weaknesses to avoid any external threats at the same time.

INTERN → ↓ EXTERN	STRENGTH •Strong philosophy •Financially stable •Unique selling point through packaging •Sustainable product with a extraordinary background story •Price policy: good price performance ratio •Location of the winery, close to Lisbon •Diversity of grape varieties and wine types •Flexible product line •Brand communication on Facebook	WEAKNESS •Online performance of the winery •No online sale of Tyto Alba possible •No flavor direction on the label •Back label only in English language •No direct control over exports and image communication, through the usage of an external export company •No German speaking employees
OPPORTUNITIES • Germany as a sustainable country •Rising German tourists in Portugal •Specialist retail stores awareness of Portuguese wine potential •Premium wine market in Germany offers diversity of niches •Liberal wine market •No wine tax in Germany •High purchasing power of consumers •German tourists in Portugal	OS –STRATEGY ➢Focus on Franchised Wine Shops, to generate a higher volume trade ➢Bigger importers (list provided) ➢Biggest specialist retailer Jaques wine depot ➢Generating the direct presentation of the product with the importers and shops through sample sending ➢Using the franchised wine shops to get attention from supermarkets after implementation of the brand	OW – STRATEGY ➢Push strategy, sending samples to hunting clubs, nature conservation organizations, to address directly the target group (list provided) ➢Being present on garden, hunting fairs ➢Contact with trade journals ➢Creating Multipliers ➢Presenting the bottle always with the birdhouse, as differentiation
THREATS • increasing market concentration •Federal complexity of the German market •High volume trade by discounters •Price sensitive wine consumers •New World countries as competitors •Weak image of Portuguese wines and low market share	ST – STRATEGY ➢Focus on smaller regional specialized retailers, which are focused on Portuguese wines (list provided) ➢customers with high purchasing power. ➢Using sales man position to communicate the wine into detail to the consumer ➢Using German tourists as multipliers and inform them into detail about the grape variety Touriga Nacional ➢Using the international grape varieties as a known communication tool	WT – STRATEGY ➢Making an online shop possible ➢Positioning of Tyto Alba in a niche ➢Profit from the target group analysis and focus on the three evaluated regions: Rhineland-Palatinate, Hessen, NRW ➢Communicating the already available online shops to the German visitors in the winery ➢Change the back label for the German market, with flavor description ➢More communication with Saven company

Figure 20 TOWS Matrix, Tyto Alba on the German Wine Market, Own representation

OS - STRATEGY: FRANCHISED SPECIALIST RETAILERS

As the wine "Tyto Alba" is a complex product, positioned in the premium price segment, with the necessity of communication about the history of the product it is worth to focus on the distribution channel of the specialist retailers, as their salesman have the ability to communicate directly to the consumers. Also strategically expedient about this distribution channel is the fact that wines, which are successfully implemented in the specialist retailers, are having a major chance to get listed in the supermarkets, as wine consumer trends originate in the specialist retail stores.

Another reason for this choice of distribution channel is the very positive feedback of Portuguese wines among wine experts and the awareness of professionals about the Tejo wine growing region, which represents a rareness in wine shops. Furthermore the term Tejo river is becoming more famous through the rising tourism in Lisbon and is therefore becoming more popular among wine consumers.

Also the packaging of "Tyto Alba" as a nest box for birds implements a nature affine consumer, who is aware and interested in environmental balance and animal protection. The market for sustainable wine is still considered to be a niche, but a niche with growing potential. Entering this market also involves challenges, such as convincing consumers of the quality of wine or communicating the value of your sustainable approach, therefore the right distribution channel is clearly the specialist retail store. In this case the franchising wine shops are offering great opportunities as they are interested in innovative products for their peripheral assortment.

A big advantage of the franchised wine shops is their distributed location in Germany and would spread the wine brand "Tyto Alba" to a wider range of consumers. To have direct contact to the most important and most present franchised wine shops in Germany, a detailed list was worked out with all necessary contact data. This list is enclosed in the Annex (Annex 2) and will be useful to work with for the export company "Wines and Winemakers by Saven". The direct contact to these wine shops is highly recommended and sending samples of the wine including the wooden box is a good way to start business relations. Also meetings with agents of these franchise wine shops on the next ProWein are possible to arrange and invitations in the winery are also appreciated.

OW - STRATEGY: PUSH STRATEGY

The Opportunities of the external market analysis are showing a growing interest of German citizens in sustainability. To address these group of people directly a push strategy is recommended in this case, which means to create customer demand for the wine brand "Tyto Alba" through various activities to get the brands message in front of your ideal client. In Germany there are plenty of possibilities to get in contact with nature affine clients.

As Germany is a country known by its big surface of forest, it matches to the wineries philosophy of forest protection and awareness of nature. A matching group of people are the hunting associations in Germany, with a number of 245.000 members they can be considered as a valuable target group, which could be approached at a hunting trade fair, which is held each year in Germany. For example the "Jagd und Hund" hunting fair in Dortmund with 800 exhibitors and 80.000 visitors. Or the "Pferd and Jagd" fair in Hannover had over 850 exhibitors and circa 95.000 visitors in 2016. Another example would be the "Jagen und Fischen" fair in Augsburg with 280 exhibitors. (Messe, 2017) All upcoming dates in 2017/18 of hunting, nature and garden fairs can be found on this homepage: https://www.messen.de/de/1471/branche/jagdausruestung. Members of German hunting associations are known to be rather prosperous people, with a purchasing power that is partly directed towards a luxurious life style which includes good wine and food. Moreover they match to the evaluated target group and correspond perfectly to the outlined characteristics.

Being present on these hunting, garden and nature fairs would be an extraordinary, outstanding action of the winery and would catch the attention of a big amount of potential clients. Presenting the wine including the nest box, communicating the wineries vision of sustainability and forest protection in this matching surrounding would create an enormous feedback and would strengthen the wineries imagine and would cause press publications in specialist hunting, nature journals. Due to this push strategy important multipliers are created.

ST - STRATEGY: REGIONAL FOCUS

As the German wine market is highly differentiated caused by its federal regions and different consumer behaviors the evaluation of the target group and its location functions as a narrowing tool. Therefore the ST-Strategy takes advantage from the three worked out federal regions: namely Rhineland-Palatine, Hessen and Nordrhein-Westfalen. In these three regions a higher purchasing power of the consumers and a higher wine consumption is given, which places the premium priced wine Tyto Alba at its right place.

Another measure, to avoid the market pressure of the diversity of New World wines and classic Old World wines would be to focus on specialist retailers only or mainly focused on Portuguese wines. These individual wine shops are searching for new innovative products. The advantage of these individual specialist wine shops is that consumers are choosing the wine growing country already by entering the wine shop, they are aware of the country and its wines. The salesman is able to inform the consumer into detail about the product and its background. In the case of the wine brand Tyto Alba the history and intention of the winery provides an exciting story to tell, which is also a reason for to get listed in these shops.

Furthermore these wine shops often combine their point of selling with a wine bar, events and tastings, which gives consumers the chance to taste the wine. Another positive aspect is that additional products like presents, gift boxes, gourmet food and Portuguese specialties are included in the shops' peripheral assortment, so that the wooden nest box of Tyto Alba matches in the portfolio, represents a perfect gift item and additionally differentiates itself highly from other Portuguese wines. Also the fact that Tyto

Alba is available in the international grape varieties Merlot and Sauvignon Blanc functions as another differentiation measure.
The Portuguese wine shops are mostly located in the following cities: In Nordrhein-Westfalen: Köln, Düsseldorf, Dortmund, Essen Duisburg. In Hessen: Frankfurt am Main, Wiesbaden, Kassel, Darmstadt, Gießen. In Rhineland-Palatine: Mainz, Ludwigshafen, Trier, Koblenz, Kaiserslautern, Neuwied. A detailed list with Portuguese wine shops and all their contact data is provided in the Annex. (Annex 3)
Due to this regional focus the external threats can be minimized, while the internal strengths of the wine Tyto alba are maximized.

TW - STRATEGY: COMMUNICATION POLICY

In the case of the TW-Strategy, external threats and internal weaknesses should be minimized, through a strengthening of the companies communication policy. If exporting professionally to the German wine market, this implies first of all the revision of the wines back label, as it is only available in English and Portuguese. Another crucial factor is, that German wine consumers evaluate the flavor of the wine as a crucial category for their purchasing decision. Therefore the flavor direction "dry", (in German "trocken") should be outlined on the back label, as well as a detailed description of the general flavors, as well as possible food pairings. Especially in purchasing situations without the help of a salesman, these information are crucial for the consumer to decide.
The online representation of wineries is an important matter nowadays. As the winery has the intention to spread its name through the wine brand Tyto Alba, the homepage of the wine should therefore clarify the connection between the brand and the winery Companhia das Lezírias. A description of the winery should be implemented, or at least a homepage link.
Another important point is, that the winery Companhia das Lezírias does not have an own online homepage, which would be necessary for consumers and importers and which would give possibility to present the whole portfolio of the winery. In this context an online shop, especially for the wine brand Tyto Alba should be taken into consideration, as the winery has the ability to communicate this purchasing possibility easily to their visitors in the winery. Foreign tourists often do not have the chance to buy bottles of wine, caused by their traveling with hand luggage, a later purchase through an online shop is often preferred. For German visitors the German online shop "Bom Dia" can be passed on, as they would avoid shipping costs. Another measure to minimize internal weaknesses is to intensify the contact and consultations with the export company "Wine and Winemakers by Saven" to clarify marketing strategies and to ensure a clear communication of the wine brand "Tyto Alba", to avoid misunderstandings from German importers and to strengthens the brand image.

7. Discussion and Conclusion

All applied tools, from the PEST and SWOT Analysis to the additional creation of the TOWS Matrix showed, that an implementation of the wine brand "Tyto Alba" is possible on the German wine market. With the aid of this detailed market knowledge the companies know-how is set on another level. Hereby the responsibility and the realization of a clear marketing strategy is depending on the wineries future measures and investments. A more intense focus on the export section of the winery requires an intense cooperation with the company of "Wines and Winemakers by Saven" to clarifies strategies and budget allocation.

To spread the name of the winery Companhia das Lezírias a clear and consistent cooperate design and a strong public relation representation is necessary for future market entries and the expansion of the winery. The diverse portfolio of the winery offers many chances on several markets. The market and consumer analysis of the German wine market can further be used for other wine brands of the company. The four strategies developed in the TOWS Matrix representing the enormous facilities of the winery and can be seen as inspiration for future strategies.

All in all the wine "Tyto Alba" presents a unique, individual product with high potential and suits into the German wine market. It matches to the country Germany and its philosophy is a convincing selling point. The enthusiasm reflected in the details of the wine brand has potential to be communicated more intensively and offers great chances to get closer to the consumer. Nowadays the topic sustainability is gaining influence in society, which transforms the philosophy of Companhia das Lezírias and its actions into a role model for the whole wine industry.

8. References

Ammerman, P. (2013): *"German Wine Market Opportunities"*
http://www.navigator-consulting.com/articles/german-wine-market-opportunities/32, reviewed: 05.04.2017

ARD (2016): ARD - ZDF, Onlinestudien
http://www.ard-zdf-onlinestudie.de/, reviewed at: 19.05.2017

BFN (2015): Federal Ministry for Environment Nature Conservation, Building and Nuclear Security. Nature Awareness Study 2015
http://www.bmub.bund.de/fileadmin/Daten_BMU/Pools/Broschueren/naturbewusstseinsstudie_2015_en_bf.pdf, reviewed: 15.05.2017

BiB (2017): Bundesinstitut für Bevölkerungsforschung,
http://www.bib-demografie.de/DE/Home/home_node.html, reviewed: 16.02.2017

BomDia (2017): Tyto Alba Online
https://www.bomdia.de/search.html?page=search&page_action=query&desc=on&sdesc=on&keywords=tyto+alba, reviewed: 19.06.2017

BPB (2016): Ein Sozialbericht für die Bundesrepublik Deutschland, Datenreport 2016
https://www.destatis.de/DE/Publikationen/Datenreport/Downloads/Datenreport2016.pdf?__blob=publicationFile, reviewed at 20.03.2017

Bruwer, J. (2004): "The Love Affair of Generation X Consumers with the Wine Cellar Doors", The Australian and New Zealand Grape Grower and Winemaker, December, pp. 19-24

BSI, (2016): Bundesverband der deutschen Spirituosen-Industrie und Importeure e.V.
http://www.spirituosen-verband.de/themen/marktanalysen/, reviewed: 02. 04. 2017

BusinessCulture (2016): Business Etiquette in Germany.
http://businessculture.org/western-europe/business-culture-in-germany/business-etiquette-in-germany/ reviewed at 20.03.2017

Businessnewsdaily (2016): PEST Analysis
http://www.com/5512-pest-analysis-definition-examples-templates.html

Cabral, B. (2017): Wine maker of Companhia das Lezírias, Winery visit

Caldeira, J. (2017): Marketing manager of Companhia das Lezírias, Interview

Carvalho, S. (2009): Internationalization Processes of Portuguese Wine Production SME's in Germany and Russia. Master Thesis, Instituto Superior de Ciências do Trabalho e da Empresa

CBI, (2016): Ministry of Foreign Affairs; *"Exporting Wine to Germany"*
https://www.cbi.eu/market-information/wine/germany/wine/, reviewed at 02.04.2017

Charter, S., Gallo, J. (2014): Wine Business Management, Pearson France, Paris pp. 178-200

Christ, E. (2014): Analyse deutscher Bio-Weinkonsumenten mithilfe einer repräsentativen Stichprobe, Hochschule Geisenheim University, Bachelor Thesis

CL (2017): Companhia das Lezírias
http://www.cl.pt/htmls/pt/home.shtml, reviewed at 31.04.2017

CIA (2017): Central Intelligence Agency - The World Factbook: Germany
https://www.cia.gov/library/publications/the-world-factbook/geos/gm.html

DESTATIS, Statistisches Bundesamt (2017): https://www.destatis.de/DE/Startseite.html, reviewed at 13.03.2017

DWI (2015): Deutsches Weininstitut
http://www.deutscheweine.de/

DWI (2016): Deutsches Weininstitut, Weinmarkt 2015

Hanf, J. (2017): *Operatives Marketing*, Lecture of Hochschule Geisenheim University.

Henne, L. (2015): *"How the Portuguese wine can further penetrate the German wine market*", Master Thesis of Vinifera Euromaster, Instituto Superior Agronomia

Hoffmann, D. (2008): Der Deutsche Premium Weinmarkt, Weinökonomie Geisenheim, Hochschule Geisenheim University

Hoffmann, D. (2015): German Wine Market Structure, Weinökonomie Geisenheim, Hochschule Geisenheim University.

GfK (2014): Für welche Warengruppen haben die Deutschen am meisten Geld – und wo? http://www.gfk.com/de/insights/press-release/fuer-welche-warengruppen-haben-die-deutschen-am-meisten-geld-und-wo/

GfK (2017): Kaufkraft in Deutschland steigt 2017, http://www.gfk.com/de/insights/press-release/kaufkraft-deutschland-2017/, reviewed: 16,04.2017

Investopedia (2017): "The World's Top 10 Economies"
http://www.investopedia.com/articles/investing/022415/worlds-top-10-economies.asp

IVV (2015): Instituto da Vinha e do Vinho, Portugal
http://www.ivv.gov.pt/np4/documentos/documentos?tema=191, reviewed at: 22.05.2017

KdL (2017): Kenn dein Limit - Alkoholpolitik
https://www.kenn-dein-limit.info/gesetzliche-regelungen.html, reviewed: 11.04.2017

Kotler, Ph.; Keller, K. L.(2008): Marketing Management, 12th Ed., Prentice-Hall, 2006., Prijevod, MATE, Zagreb

Luso, O. (2015): "Keine billig Weine", Weinwirtschaft, Magazine Number 18, Page 14

MarketResearchReports (2016): http://www.marketresearchreports.com/countries/germany, reviewed at 15.02.2017

Meininger (2015): *"An overview of the German Wine Market"* https://www.meininger.de/de/node/681731, reviewed at 22.04.2017

Meininger (2016): "*A snapshot of the German Wine Market"* https://www.meininger.de/de/node/758822

Ostrow, R. (2009): The Fairchild Dictionary of Retailing, Second Edition, New York, Fairchild Books, Inc.

Patricio, F. (2012): Internationalization Strategy of Aveleda`s Wine in the Chinese Market. Master-Thesis. In Management from Nova School of Business and Economics

Pilz, H. (2017): *"Der Weinmarkt in Deutschland – ein komplexes Gebilde*", http://blog.drinktec.com/de/1999/

Podevils World of Wine (2017): Tyto Alba Branco Online https://www.rakuten.de/produkt/wines-und-winemakers-tyto-alba-doc-sauvignon-blanc-2014-bio-1578306160.html?pt=5&pb=box1, reviewed: 20.09.2017

Rosário, M. (2001): "Marktanalyse eines kleinen Anbieters in einem heterogenen Markt - das Beispiel portugiesischer Weine in Deutschland", Forschungsanstalt Geisenheim, Band 45

Rouchy, M. (2017): An expert's thoughts on the German market https://www.meininger.de/en/wine-business-international/experts-thoughts-german-market

ProFound (2016): Distribution Channels of the German Wine market. https://www.profound.com/Home.aspx?ReturnUrl=%2f, reviewed: 13.05.2017

Schmitt, M (2008): *"Strukturanalyse des deutschen Fachhandels in ausgesuchten Städten des Ruhrgebiets"*, Diplomica Verlag GmbH.

Schwarzwälder, D (2015): *"Portugal schwimmt sich frei"*, Weinwirtschaft, Magazine Number 18, Page 14

Sinus (2015): Sinus-Milieus. Sinus-Institut für Markt-und Sozialforschung. https://www.sinusinstitut.de/fileadmin/user_data/sinusinstitut/Downloadcenter/Informationen_zu_den_Sinus-Milieus.pdf reviewed at: 24.06.2017

Statistika (2017): Deutschland: Bruttoinlandsprodukt (BIP) pro Kopf von 1991 bis 2016, https://de.statista.com/statistik/daten/studie/1252/umfrage/entwicklung-desbruttoinlandsprodukts-je-einwohner-seit-1991/, reviewed at 20.02.2017

Szolnoki, G., Hoffmann, D. (2014): Neue Weinkundensegmentierung in Deutschland. Hochschule Geisenheim University, Geisenheimer Berichte Band 73

Szolnoki, G., Loose, S. (2016): The Younger Generation. A question of age – German wine drinkers and their consumption behavior with focus on the younger generation.
Geisenheim University, Institut für Betriebswirtschaft und Marktforschung

TA (2017): Tyto Alba Wine brand, Companhia das Lezírias.
http://www.tytoalba.pt/index.php?lang=en#!prettyPhoto, reviewed: 18.06.2017

UKessays (2015): A Pestle Analysis of Germany
https://www.ukessays.com/essays/economics/a-pestle-analysis-of-germany-economics-essay.php, reviewed at 22.02.2017

Weinwirtschaft (2017): "Tejo - zwischen atlantischer Frische und kontinentaler Kraft", Weinwirtschaft Magazin, Number 04/2017,

WineBusinessInternational (2017): An expert's thoughts on the German market
https://www.meininger.de/en/wine-business-international/experts-thoughts-german-market

Veseth, M. (2016):, Swirling Wine Export Currents: China, Australia, Portugal, Angola, USA, Brazil, Wine Economist Magazine, May 2016
https://wineeconomist.com/2016/05/02/portugal-2/ reviewed at: 01.05.2017

WineFolly (2016): http://winefolly.com/review/guide-to-german-white-wine/, reviewed at 13.03.2017

Zoll (2017): Verbrauchersteuern für alkoholische Getränke.
http://www.zoll.de/DE/Fachthemen/Steuern/Verbrauchsteuern/Alkohol- wein_node.html reviewed: 11.04.2017

9. Annex

ANNEX 1 - Price list of the full portfolio

Companhia das Lezírias

COMPANHIA DAS LEZÍRIAS

			Cor	Designativo	P.V.P. (c/IVA)	P.V.P. (s/IVA)	Grossista Desc.	Grossista Net	Retalhista Desc.	Retalhista Net	Export
Catapereiro											
Catapereiro (exclusivo Pingo Doce)	2015	75 cl	Tinto/Red	Reg. Tejo	2,39 €	2,12 €					
Catapereiro (exclusivo Pingo Doce)	2015	75 cl	Branco/White	Reg. Tejo	1,99 €	1,76 €					
Herdade de Catapereiro Reserva	2015	75 cl	Tinto/Red	Reg. Tejo	5,99 €	5,30 €	25%	3,98 €	15%	4,51 €	3,55 €
Herdade de Catapereiro	2015	75 cl	Tinto/Red	Reg. Tejo	2,79 €	2,47 €	25%	1,85 €	15%	2,10 €	1,88 €
Herdade de Catapereiro	2014	75 cl	Branco/White	Reg. Tejo	2,79 €	2,47 €	25%	1,85 €	15%	2,10 €	1,88 €
Herdade de Catapereiro	2014	75 cl	Rosé	Reg. Tejo	2,79 €	2,47 €	25%	1,85 €	15%	2,10 €	1,88 €
Herdade de Catapereiro	2015	37,5 cl	Tinto/Red	Reg. Tejo	1,75 €	1,55 €	25%	1,16 €	15%	1,32 €	1,35 €
Herdade de Catapereiro	2015	37,5 cl	Branco/White	Reg. Tejo	1,75 €	1,55 €	25%	1,16 €	15%	1,32 €	1,35 €
Herdade de Catapereiro Magnum	2012	150 cl	Tinto/Red	Reg. Tejo	6,99 €	6,19 €	25%	4,64 €	15%	5,26 €	
Herdade Catapereiro Escolha	2015	75 cl	Tinto/Red	Reg. Tejo	3,39 €	3,00 €	25%	2,25 €	15%	2,55 €	2,63 €
Herdade Catapereiro Escolha	2015	75 cl	Branco/White	Reg. Tejo	3,39 €	3,00 €	25%	2,25 €	15%	2,55 €	2,63 €
Companhia das Lezírias											
Companhia das Lezírias Colheita Tardia	2013	50 cl	Branco/White	DOC Tejo	12,90 €	11,42 €	25%	8,56 €	15%	9,70 €	10,70 €
Tyto alba											
Tyto alba	2013	75 cl	Tinto/Red	DOC Tejo	6,20 €	5,49 €	25%	4,12 €	15%	4,66 €	4,25 €
Tyto alba	2015	75 cl	Branco/White	DOC Tejo	5,20 €	4,60 €	25%	3,45 €	15%	3,91 €	3,64 €
Tyto alba	2015	75 cl	Rose	DOC Tejo	5,20 €	4,60 €	25%	3,45 €	15%	3,91 €	3,64 €
Tyto alba Sauvignon Blanc	2015	75 cl	Branco/White	DOC Tejo	6,20 €	5,49 €	25%	4,12 €	15%	4,66 €	4,25 €
Tyto alba Merlot	2013	75 cl	Tinto/Red	DOC Tejo	7,50 €	6,64 €	25%	4,98 €	15%	5,64 €	5,81 €
Tyto alba Touriga Nacional	2014	75 cl	Tinto/Red	Reg. Tejo	8,90 €	7,88 €	25%	5,91 €	15%	6,69 €	7,01 €
1836											
1836 Grande Reserva	2014	75 cl	Tinto/Red	DOC Tejo	25,00 €	22,12 €	25%	16,59 €	15%	18,81 €	20,74 €
1836 Grande Reserva MAGNUM	2014	150 cl	Tinto/Red	DOC Tejo	49,50 €	43,81 €	25%	32,85 €	15%	37,23 €	
1836 Grande Reserva	2015	75 cl	Branco/White	DOC Tejo	25,00 €	22,12 €	25%	16,59 €	15%	18,81 €	20,74 €
1836 Espumante Bruto	2015	75 cl	Branco/White	DOC Tejo	9,90 €	8,76 €	25%	6,57 €	15%	7,45 €	
Senhora de Alcamé											
Senhora de Alcamé Bag-In-Box		500 cl	Tinto/Red	Mesa	6,29 €	5,57 €	17%	4,62 €	12%	4,90 €	5,78 €
Senhora de Alcamé Bag-In-Box		500 cl	Branco/White	Mesa	6,29 €	5,57 €	17%	4,62 €	12%	4,90 €	5,78 €
Senhora de Alcamé Bag-In-Box		1000 cl	Tinto/Red	Mesa	11,89 €	10,52 €	17%	8,73 €	12%	9,26 €	10,92 €
Senhora de Alcamé Bag-In-Box		1000 cl	Branco/White	Mesa	11,89 €	10,52 €	17%	8,73 €	12%	9,26 €	10,92 €

ANNEX 2 - Franchise specialist retailers in Germany

JAQUES WINE DEPOT

Eschersheimer Landstraße 12

60322 Frankfurt-Zentrum

Tel.: 069 / 55 01 97

Fax: 069 / 55 01 37

VINOS

Wein & Vinos GmbH

Knesebeckstr. 86

D-10623 Berlin

fachhandel@vinos.de

VILLA VINUM
>Wine bar and wine shop
Große Bleiche 44, 55116 Mainz
Tel: 06131 211207

VOM FASS
Obere Köngisstr. 39
34117 Kassel
0561 95379037
Mariusz Dudek

VOM FASS
Lange - Geismar Str. 30
37073 Göttingen
0551 4996395
Andrea Katzmann

GALLIER WINE STORE
Kirsten Schmidt
Osthofenstr. 37,
59494 Soes
info@gallier.de

MÖVENPICK WEINHANDLUNG GmbH & Co. KG
Hanauer Landstr. 204-206
60314 Frankfurt am Main
Tel (0 69) 48 98 16 86
Fax (0 69) 48 98 16 87
weinkeller.frankfurt@moevenpick.com

BACCUS WEIN
Burg Layen 1
55452 Burg Layen
Tel.: (0) 67 21 – 96 51 40
Fax: (0) 67 21 – 96 59 98 14 0
info@bacchus.de

VIF Internationale Weine
Meyer & Sistermanns GbR
Rethelstr. 139 (Innenhof)
40237 Düsseldorf
Tel: 0211 8302 5149
Fax: 0211 8302 5150
umeyer@vif.de

ANNEX 3: Wine specialist retailers - specialized on Portuguese wine

COMPAS DU VIN -
>Wines only from France and Portugal, Wine bar and shop
Alexander Meding
Geschäft/Café: Goldgasse 4
65183 Wiesbaden

Telefon: 0611-988 28808
Mobil: 01578-4301700
alexander.meding@compasduvin.com
www.compasduvin.com

WEINVERITAS
>Wines only from Germany and Portugal, with wine bar, tasting and events
Katharina Wegner
Luxemburgplatz 5
65185 Wiesbaden
Germany

Telefon +49 611 50 58 93 72
Mobilm+49 151 40 7147 92
info@weinveritas.de
http://weinveritas.de/

PORTERRA Wines - Inspiration Portugal:
>Wines only from Portugal

Pfefferstr. 8
47441 Moers
Tel.: +49 2841 888253
info@porterra.d
http://www.porterra.de/weine_uebersicht.htm

OVINHO PORTUGAL-IMPORT
Frankfurter Straße 31
35037 Marburg
Deutschland
06421 1680910

CASA DE PORTUGAL
>Portuguese specialties with food and wine
Casa de Portugal
Brückenstr. 60
60594 Frankfurt am Main
Telefon: +49 069 61 84 00
Fax: +49 069 57 800 553
E-Mail: info@casadeportugal.de

WEINHANDLUNG DR. TEUFEL
Kleiner Hirschgraben 4,
60311 Frankfurt am Main, Deutschland
weinteufel.de
+49 69 283236

CAVE PORTUGUESA
Wines and food from Portugal
Erkrather Strasse 214
40233 Düsseldorf
Fon: +49 (0)211 - 984 77 37
Fax: +49 (0)211 - 416 611 38
info@cave-portuguesa.de

SAUDADE

>wine and food from Portugal

Wahlenstraße 2

50823 Köln

Tel: 0221-5796476

WEINPUNKT Hoffmann und Horstmann GbR

Antwerpener Str. 9 – 11

50672 Köln

info@wein-punkt.de

t +49 (0)221-976 21 66

f +49 (0)221-976 21 67

FEINKOSTMARKT PORTUGAL

Fon: +49 (6348) 9596836

Fax: +49 (6348) 9596837

shop@feinkostmarkt-portugal.de

BEHRERNS WEINE

>Wines from Portugal, Germany and France

Wolfgang Behrens

Erlenweg 3 d

D-65187 Wiesbaden

Tel +49 611 - 87 318

BehrensWeine@t-online.de

Fax +49 611 - 56 50 468

AEF WEINE

Mörsenbroicher Weg 58 40470 Düsseldorf

Telefon:0211 - 22962332 / 0175 - 1685636

Fax: 0211 - 17176824

Email: info.aef@t-online.de